Accelerate Sales Through Exceptional Delivery of CX

CXps 2019

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Session Focus

- Sales as an Act of Service
- Sales Fundamentals
- Selling through Client Experience
- Selling and the 6 Pillars of CX
- Sales/CX Best Practice Brainstorming
- Sales/CX 6-Grid

Sales as an Act of Service

Why Do So Many People Disdain Sales People?

- Sales in inherently self-interested.

- Sales is often about "getting" business.

- Sales people often live into their stereotypes.

- Sales can be achieved opportunistically by preying on buyer vulnerability.

- Sales is often a one-way, one-and-done transaction.

- Sales feels like a "takers" game – not a "givers" game.

The Buying / Selling Paradox

Buyers Buy	Sellers Sell
♥ **Emotionally**	**Rationally**
Sellers Justify	Buyers Justify
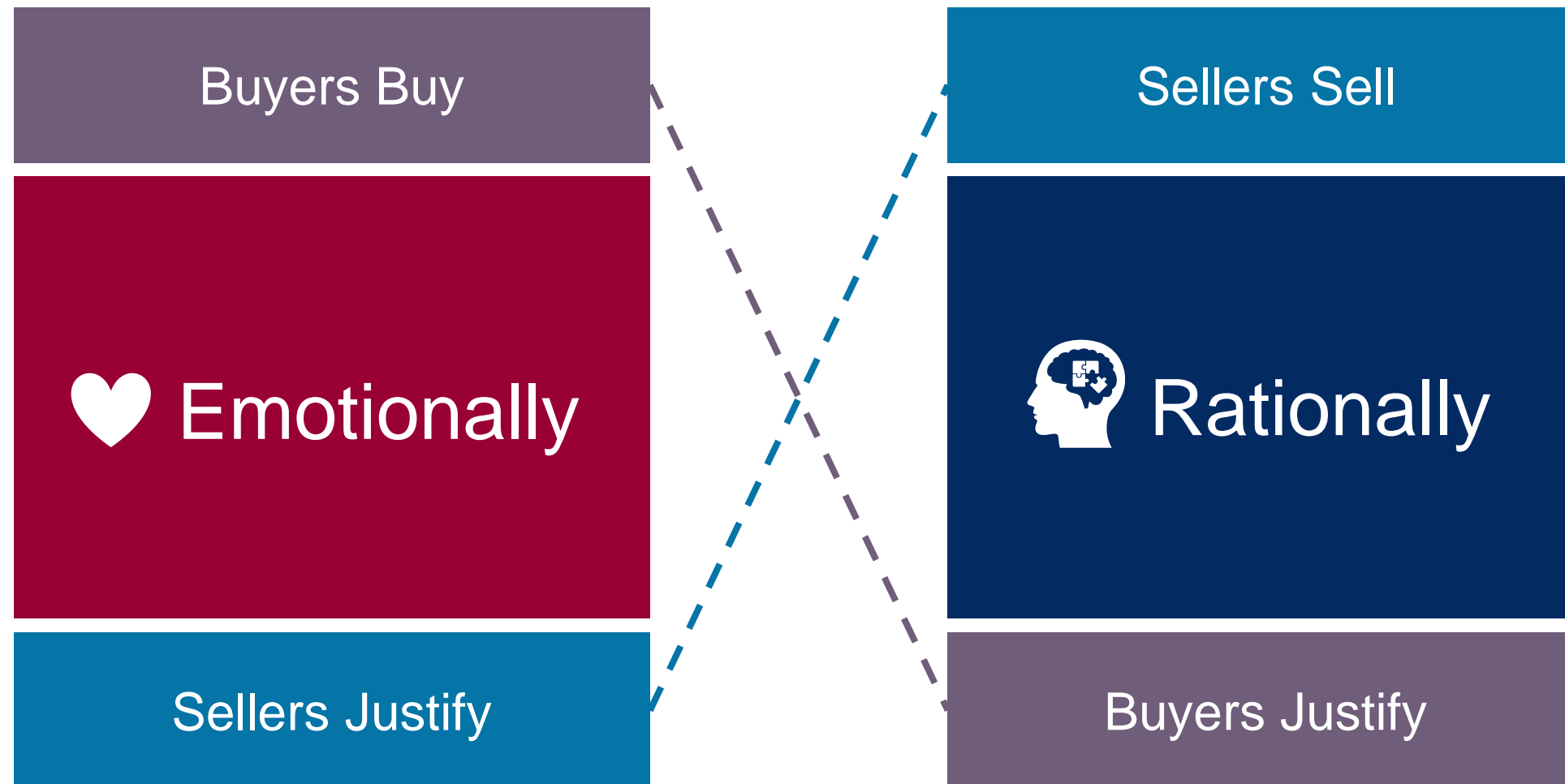
Buying Triggers: The Four C's

CONCERN

CURIOSITY

CONFIDENCE

CONNECTION

Underlying Principles

| Sales is the natural outcome of an authentic relationship | Sales is providing solutions to problems that should be solved | Success will be determined by more HOW than by WHAT |

Core Values for High Impact Selling

A — Authenticity **G** — Generosity **I** — Intentionality **L** — Leadership **E** — Engagement

DNA of Sales Effectiveness

Target

Identify contact within your target market and find the "IN" that establishes affinity or interest in having a relationship
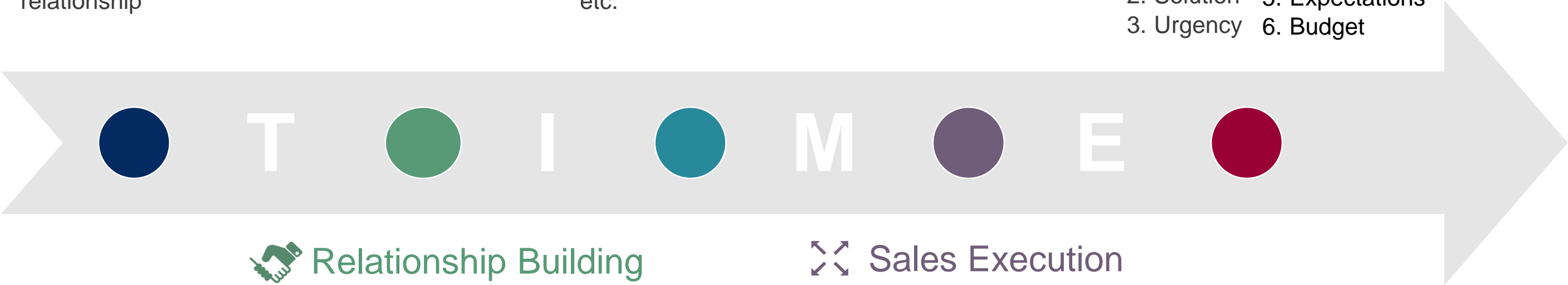
Transition

Be aware of when any triggering event happens that aids in identifying a legitimate need, problems, opportunity, etc.

Close the Deal

Close business when you satisfy the Six Qualifiers:

1. Problem   4. Access
2. Solution   5. Expectations
3. Urgency   6. Budget

T   I   M   E

Relationship Building

Build and nurture the relationship with authenticity and provide solutions to problems that should be solved

Sales Execution

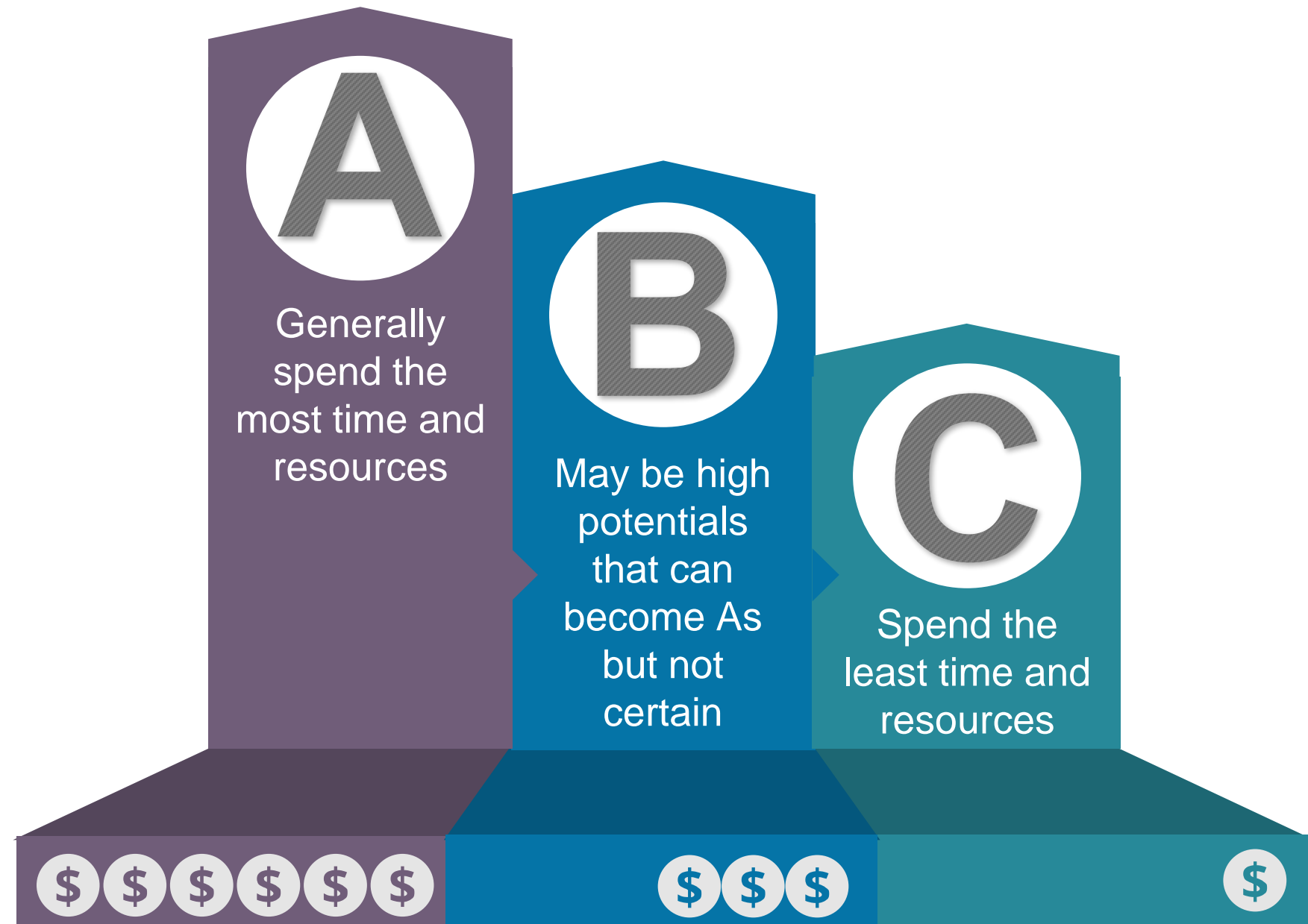Execute a sales process that may include introductions, content, pitches, solution planning and proposals

Sales Fundamentals

GrowthPlay.

Targeting & Contact Management Fundamentals

What is your target market?
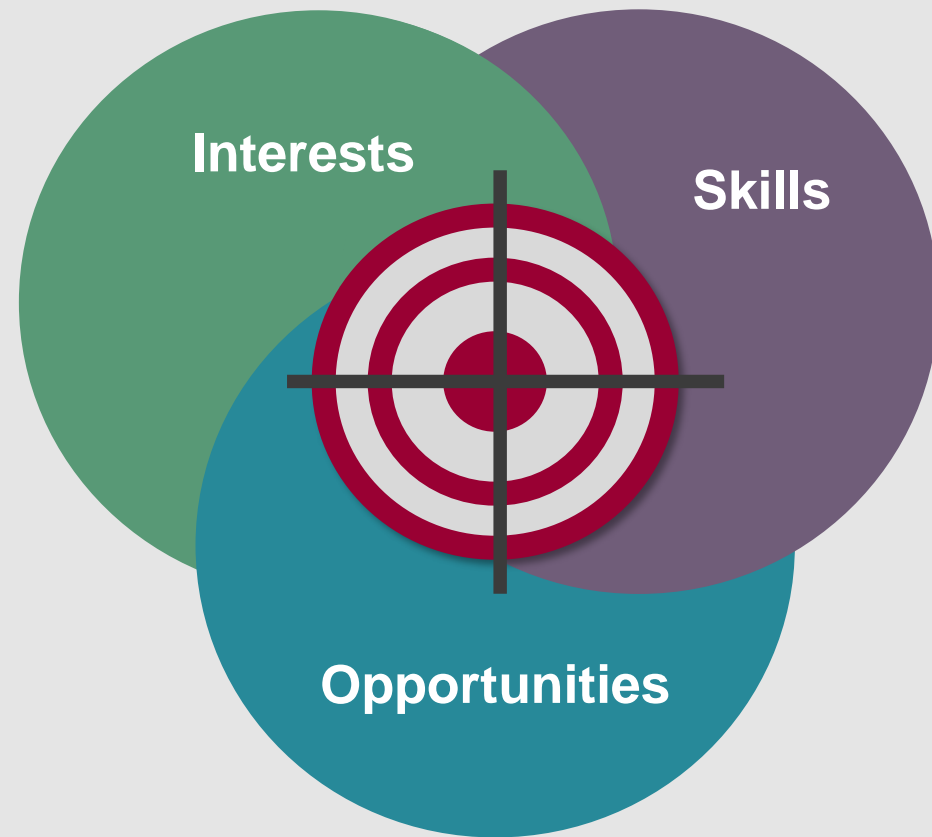
Interests

Skills

Opportunities

A Generally spend the most time and resources

B May be high potentials that can become As but not certain

C Spend the least time and resources

Messaging Fundamentals

Your Headline Messages

> **What Do You Do?**

> **What's New?**

> **Why You?**

Dream Out Loud

Authentic acknowledgement

Communicate goal or vision

Ask for advice or input

GrowthPlay

Relationship Building Rigor

Apply the Platinum Rule

Use Authentic Reasons "3 INs"
Invitations
Introductions
Information

Confirm Definitive Next Steps

The Core 4 for Preparation
- Objectives
- Discovery
- Messages
- DNS

3:1 Leverage
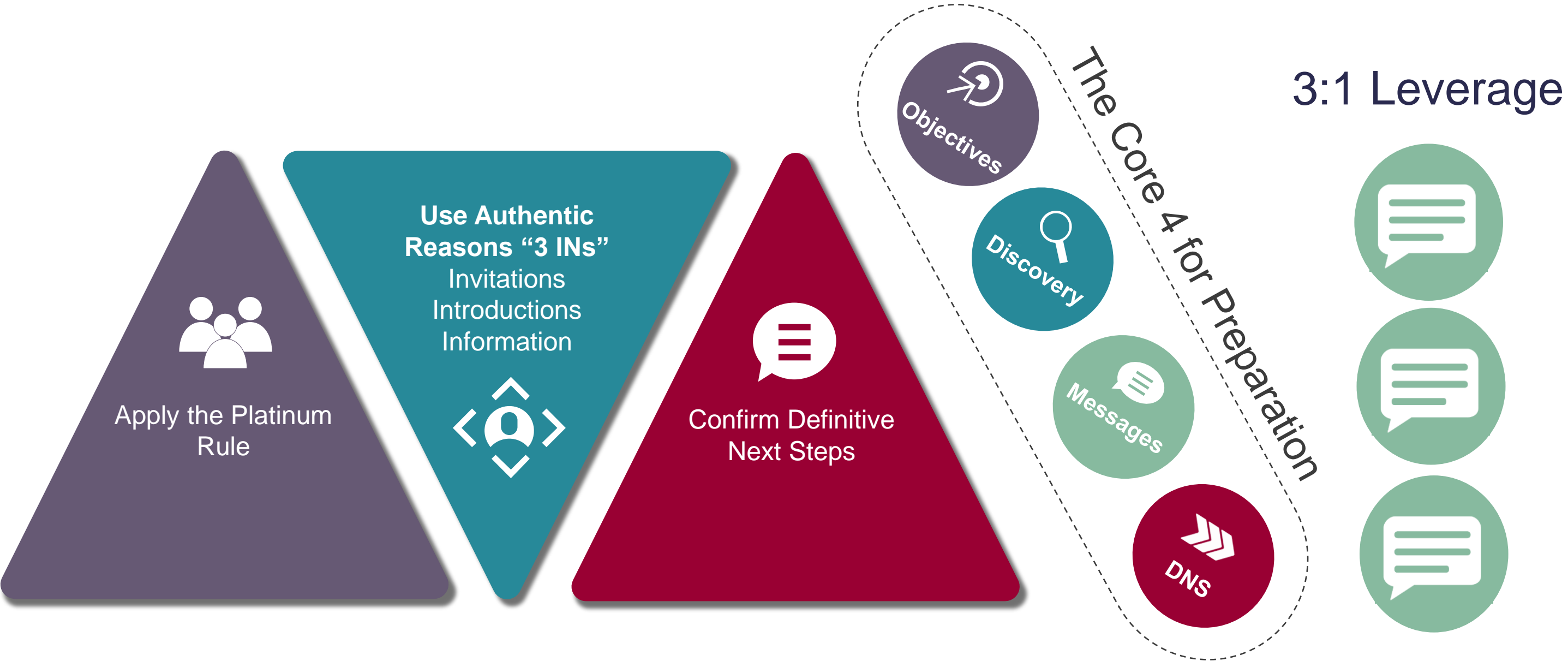
Qualification & Closing the Deal – Getting to Go/No Go

Buyer and you must be on the same page with respect to budget and financial justification for the solution where cost equates to value

Budget

Problem

Buyer must believe he/she has a problem

Buyer and you must be on the same page with respect to the amount of time and resources necessary to solve the problem

Expectations

Solution

Buyer must believe that you/the company has a plausible, credible solution

You must have access to the decision-maker(s) and their decision making criteria

Access

Urgency

Buyer must believe the problem is urgent and needs to be solved now/soon

Selling Through Client Experience

The Client Journey

1. Brand Promise

Expectations, word-of-mouth, reputation, web, digital, reviews

2. Pre-Sales Experiences

Includes research, intelligence gathering, networking

3. Sales Pursuit & Buying

Sales pitching, closing, selection

The Client Journey

6. CX & Feedback

Client survey, interviews, updating expectations & renewals

5. Client Care & Loyalty Building

Conflict resolution, communication, expectation management

4. Delivery & Client Service

Day-to-day interactions, responsiveness, billing, project management

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Fans versus SuperFans

Satisfied vs. Loyal

Passive referral vs. Active referral

Business development advocate

Personal and professional value

Early warning system

PR/cheerleader

Spend a lot more money

Spend a lot more money for a long time

Every interaction leaves a mark…
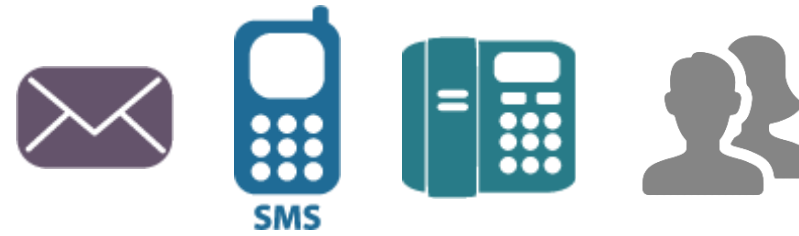
Client Experience ContINuum

INcensed   INdifferent   IN Love

GrowthPlay

Selling and the 6 Pillars of Client Experience

GrowthPlay.

Six Pillars of Client Experience

Client Experience

| Develop and maintain authentic relationships with clients | Understand and provide counsel in the context of the client's business | Communicate in ways that manage expectations and build trust and loyalty | Demonstrate appreciation for clients and their business | Initiate high impact client intake/kick-off meetings and regularly seek client feedback | Demonstrate care and relationship investment during pricing, billing and budgeting |

Pillar 1: Relationship Investment

- Care of the relationship in addition to daily substantive interactions

- Leverage unprompted communication

- Engage personal needs in addition to business needs

- Apply the Platinum Rule

- Mobilize the full team of client-facing professionals

- Establish peer-to-peer networking

- Plant seeds for long-term relationship interest

- Leverage Authentic Reasons and the 3 INs

  - Invitations

  - Introductions

  - Information/Insights

Develop and maintain authentic relationships with clients

Pillar 2: Business Intelligence Actions

- Set Google/SEC alerts for clients and their competitors
- Monitor business and competitive intelligence resources
- Request a facility and/or office tour
- Review annual reports and investor information
- Read industry and/or trade publications
- Attend trade conference or event with the client
- Gather client intelligence from other departments
- Engage alliance partners and other trusted advisors

Understand and provide counsel in the context of the client's business

Pillar 3: Communication and Expectation Management Standards

- Team members and contact information

- Status reporting protocol (e.g., "huddles")

- Communication preferences

- Urgent communication protocol

- Responsiveness standards

- Email and voicemail preferences

- Project management protocol

- Client documentation guidelines

- Interaction protocol within the client team

Communicate in ways that manage expectations and build trust and loyalty

Pillar 4: Client Appreciation

- Say "thank you"

- Send handwritten notes or cards

- Mark milestones (as culturally appropriate)

- Weddings, children, birthdays, anniversaries, empty nest, sympathy

- Use the client's products

- Promote the client's business

- Make a charitable donation in honor of your client

- Do a joint service project with your client

- Involve your client in your service work

- Seek client feedback

Demonstrate appreciation for clients and their business

Pillar 5: Client Kick-Off and Feedback

- Client Kick-off
  - Introduce the team
  - Establish "ground rules"
  - Confirm and communicate commitments

- Seek feedback
  - At the outset of the project
  - Periodically during the project
  - At the conclusion of the project
  - At regular intervals throughout the relationship

- Methods for feedback
  - Use appreciative inquiry
  - "What does it look like when we are at our best?"
  - "How can we be at our best more often?"
  - Use the Net Promoter Score (NPS) for key clients or engagements
    - "Would you refer the Company to a friend or colleague?"
  - Multiple modes - email, phone, in person
  - Relationship manager, company leadership, third party
  - Only seek feedback if you will act on it

Initiate high impact client intake/kick-off meetings and regularly seek client feedback

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Pillar 6: Billing and Fee Care

- Comply with client guidelines

- Understand your client's accounting requirements and protocols

- Engage "no surprises billing" – pre-bill preview

- Routinely review volume, cost of goods, etc. to observe trends and opportunities

- Look for cost effective ways to deliver service (before the client asks you)

- Pay attention to other preferred provider arrangements that are working for the client to determine how you might do the same

- Proactively set budgets (and reset budgets as needed) and meet them

Demonstrate care and relationship investment during pricing, billing and budgeting

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Sales/CX – 6-Grid

Relationship Investment	Business Intelligence	Communication and Expectation Management
Client Appreciation	Client Kick-off and Feedback	Billing & Fee Care

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