

Boosting Sales & Profits With Focus Selling

**by
Bill Gibson**

*Ntsika Enterprise Promotion Agency,
with a focus of rendering non-financial support to SMME's
is part of The Department of Trade and Industry in South Africa.
Ntsika, along with the support of The European Union
assisted in the Initial Development of the
Turning Entrepreneurial Spirit Into Business Opportunities program
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*The goal of this program is to be of assistance to people from all walks of business life in
S.A.*

*It can assist small business owners as well as senior executives of high growth
companies, the highly educated and the less educated, those with an excellent command
of the English Language and a minimal understanding of the English Language, and the
experienced and inexperienced business person.*

*This publication is an opportunity for growth if you take the right approach.
Keep a dictionary handy and look up the meaning of words you don't understand or stop
and ask someone who does know.*

Learning is one of the keys to staying young!

Boosting Sales & Profits With Focus Selling

Learning and Implementation Manual

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This Learning and Implementation Manual is part of a Self Learning Entrepreneur Development Program of Audio Cassette Tapes and Audio CD's.
It is specifically for individuals, investors, business owners, executives, and their staff members who are looking for new and additional business opportunities in order to make their personal life and / or business more successful.
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Our contact details can be found below.

Knowledge Brokers International S.A. (Pty) Ltd (KBI)
Tel: +27 11 784-1720 Fax: +27 11 784-2361
E-mail: bill@kbitraining.com
Web site: www.kbitraining.com

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Module 1

Focusing For Profits

Learning And Sales Development Outcomes

In this module you will:

1. Learn about categorising prospects and clients into A, B and C groups.
2. Find out how to effectively utilise the 5 Stages of Relationship Development in selling and developing relationships combined with frequency of contact.
3. Be given strategies on Retaining, Developing, Regaining and Gaining clients.
4. Complete an exercise on Retaining, Developing, Regaining and Gaining Clients.

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Module 1 Focusing For Profits

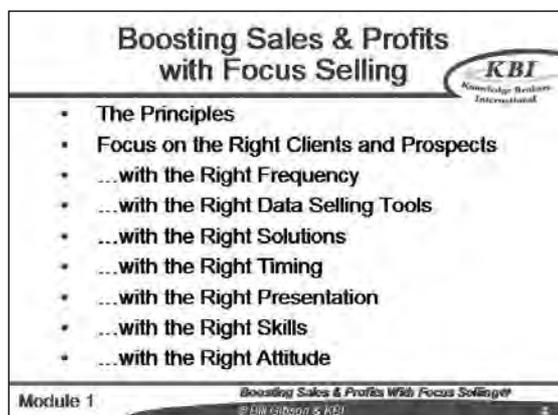
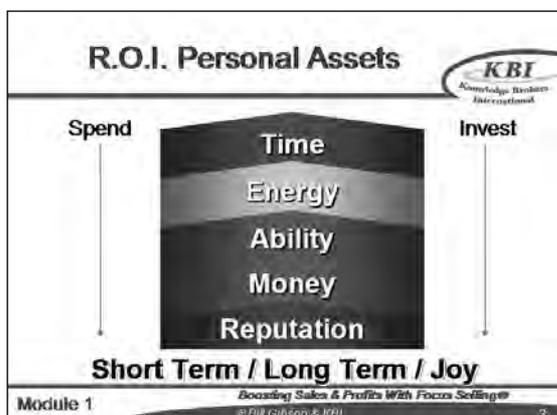
Return On Investment of Your Personal Assets

When mining companies are planning to prospect and mine for diamonds, they have to do thorough planning and careful calculations to increase their chances of success. They have to consider how much time it will take, the amount of energy that will have to be put in, the expertise that will have to be drawn on, the equipment needed, the best location to mine and the effect it will have on their reputation (share prices etc.) when it is announced. They also have to look at other resources and support they need and how much money must be invested.

As a Salesperson or business owner who needs to Prospect for new clients and mine your client base for opportunities, you need to consider what kind of return on investment you will receive from the Investing of Your Personal Assets.

Your Personal Assets include:

- **Your Time** – it is important that you invest your Time with the right people and are doing the right things to get your best return on your valuable asset called Time.
- **Your Energy** – you may have lots of Time available, but no Energy. Some people give you Energy and others drain your Energy. Certain habits and activities invigorate you and give you Energy. Other habits and activities take away your Energy. It is important to value and invest this asset called Energy wisely. When your Energy is up, you'll notice that your passion and motivation is up as well. Energy is a key ingredient to your success.
- **Your Ability** – your expertise, ideas, knowledge, skills and general “know how” is valuable. Who do you invest it with? You can waste your asset called Ability with some people and with others see great returns on the investment. It is an asset to continually develop and always use wisely.
- **Your Money** – In the beginning as a Salesperson or Business Owner there is usually a shortage of money. Even when you've been operating for a while you need to invest what you have wisely. Consider carefully who you buy coffee for or buy lunch for. Some people over lunch will give a great return on investment in referrals, business and even personal motivation and support. Other people may add no value whatsoever. An investment in new clothes, joining the right association, attending the right conference, eating at the right restaurant and buying personal development tapes may be a better investment than a night on the town with old friends. To build your business, you must invest this asset wisely.
- **Your Reputation** – Successful, experienced salespeople get most of their new business from present clients and their network of business and personal associates. This is possible because of the great Reputation they have developed. Protect your name, invest it wisely. Be honest, give real value, be considerate and respectful and network with and associate with people that only enhance your credibility. Positive word of mouth is powerful and in time it becomes your biggest asset. Select carefully the places you frequent and those people you socialise and do business with. Your name is your future. You are a brand. Invest it wisely.



Focus Selling

The Boosting Sales & Profits with Focus Selling Program is all about getting your best return on investment by Focusing your Time, Energy, Ability, Money and Reputation on the right clients, skills, activities and attitudes.

Individuals and companies throughout South Africa have witnessed as much as a 300% increase in sales within months of applying these focusing principles.

The program will help you:

1. Focus on the Right Clients and Prospects
2. ... with the Right Frequency of Contact
3. ... with the Right Data Base Selling Tools (Frequency Tools)
4. ... with the Right Solutions
5. ... with the Right Timing
6. ... with the Right Presentation
7. ... with the Right Skills
8. ... with the Right Attitude

Focus, Focus, Focus... is the Key!

The A, B, C's of Operating Your Business

As a Salesperson, business owner, entrepreneur or executive you will find that your days can be filled up with Reactive time. That means you don't have a choice of what you want to do with your Time, Energy and Ability. Reactive Time could be attending a training program you are told to attend, it could be responding to a client complaint or request, attending a sales meeting or doing your paper work. The key is what you do with the Time you have control over. This is called Pro-active Time. When you have Pro-active Time, it is important to be focusing on the Right Prospects and Right Clients. **From a Re-active or customer care point of view all clients deserve top notch service and respectful treatment regardless of the amount of business they do with you.** Your Pro-Active Time is a different story. You must get your absolute best return on investment of your Pro-Active time in order to build and sustain a good business.

This is done by making sure that you are focusing on the right Prospects and Clients with this valuable Pro-Active Time. It is done by categorising your Prospects and clients under A, B, C and D.

The A's – The Absolutes: These are the Prospects you Absolutely want to Gain and Regain and the clients that you Absolutely want to Develop and Retain. You could have A's, AA's and AAA's within this group.

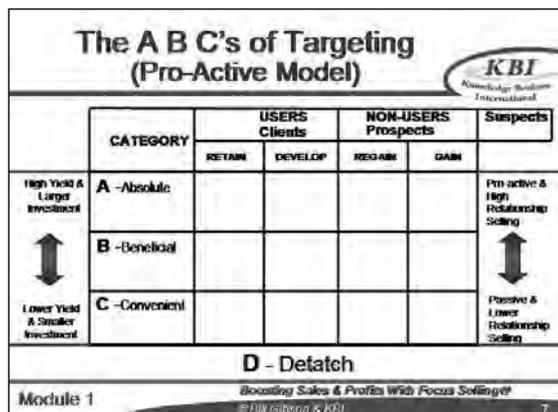
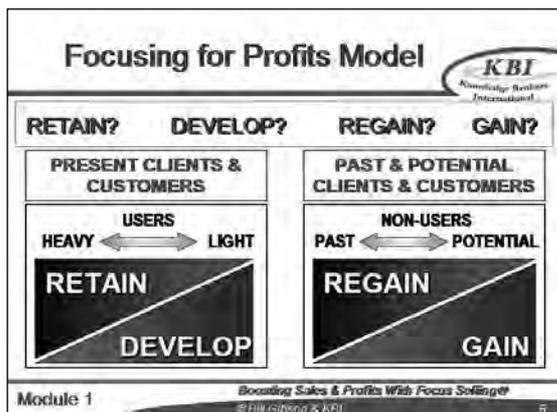
The B's – The Beneficials: These are the ones it is Beneficial to Gain, Regain, Develop and Retain but wouldn't be as valuable to you as an A but are still valuable and require Pro-Active Time.

The C's – The Convenients: These clients are Convenient (easy to handle) to have or you need Convenient ways to handle them. They still provide you with income and referrals but would not warrant the amount of Pro-Active Time that an A or B may warrant. From a Re-Active point of view they still deserve time, care and respect.

The D's – Detach: These are the Prospects and Clients that you decide to Detach yourself from. It may be because they take up too much time, energy and ability.

They could be bad for your reputation, don't pay their bills or they may be very difficult to deal with. With some Prospects and Clients you may just not be compatible.

You can obviously see why this A, B, C approach is important. Developing criteria to help you identify who is an A, B, C or D is vital.



Strategies –R etain, Develop, Regain and Gain

As a new Salesperson, you will have your own ‘U niverse of Potential Prospects’ (see pg. 5 – Figure #1) that you will define by understanding and using various criteria broken down into A, B, and C categories that defines your preferred Prospects and Clients.



From this **Universe of Potential Prospects**, you will continually identify a number of **“Suspects”** you can contact. Once you’ve made contact you will determine whether you will “drop them” or continue with follow-up, presenting solutions and building the relationship. If you decide to continue working with them, they will most likely go in your Gain Column or List. At that time you would decide whether they are an A, B, or C Gain Prospect. (See Figure #1 – Pg. 5)

As you build your business you will have clients who leave you and you want to Regain them. They would go in your Regain Prospect Column or List under A, B or C. (See Figure #1 – Pg. 5)

Your Gain and Regain Prospects will either buy and become a client, or you will continue to contact them, offering solutions and building a relationship. They may stay as a non-client but become a referral source or you may decide to drop them from your Gain or Regain List. (See Figure #1 – Pg. 5)

The ones who buy will most likely become an A, B, or C, Develop Client in the Develop Column or List. This means there is lots of room for Development because you only have some of their business. (See Figure #1 – Pg. 5)

When you have most of their business, they will end up in the Retain Column under the A, B or C category. Here you continue with renewals, do some development and hopefully turn them into a good Referral Source. (See slide #8 – Figure #1 - “The ABC’s of Targeting Pro-Active Model Review”.)

Introduction to Criteria

In order to decide whether a Prospect or Present Client is an A, B, or C client and which column heading of Retain, Develop, Regain and Gain the client fits under, you will need criteria.

The slide above, used for Radio Station account executives (Salespeople who market advertising time on their Radio Station) is an example of how criteria can be used. For the purpose of demonstrating where a Client or Prospect fits we’ve used this slide. (Slide #9 – See Slide below)

The Criteria in this case is “Possible Radio Advertising Budget Available Per Annum”.

An “A” Client or Prospect would have R48,000 of Radio Advertising per year or more available.

A “B” Client would have R18,000 to R48,000 (47999,99 to be exact) available.

A “C” Client would have less than R18,000 per annum available for Radio Advertising.

- A Client who has R70,000 P/A available and is investing R55,000 P/A which is the majority of the budget with the Radio Station would be an **“A” C lient** under the **Retain strategy** as indicated in the slide (more than R48,000 available).
- A Client who has R30,000 available and is investing R24,000 P/A with the Radio Station (the majority of the budget) would be a **“B” C lient** under the **Retain Strategy** (has R18,000 to R48,000 available).
- A Client who has R15,000 available falls in the C category. If she is investing the majority of the budget (e.g. R12,000) per annum with the Radio Station she would be a **“C” C lient** to be **Retained**.
- A Client only investing R6,000 per annum may be viewed as a “C” Account by many people because they may be looking at the criteria that says, less than R18,000 per annum available. This may be an incorrect assumption. The client may only be investing R6,000 P/A but he has R70,000 p/a available. Therefore ... he is an “A” Client to be developed. The client would go in the **A Category** under the **Develop Column**.
- The Client who only invests R6,000 p/a and has R30,000 p/a available would be a **“B”** to be **Developed** and would be in the **B Category** under the **Develop Column** (lots of room for development).
- A Client with R15,000 p/a available but only invests R2,000 p/a is naturally a **“C” Account** under the **Develop column** (lots of room for development).
- A past client who is now investing nothing with the station but has R70,000 available would be an **“A”** to be **Regained**.
- A past Client spending nothing with R30,000 available would be a **“B” R egain client**.
- A past Client with R15,000 available but invests nothing with the Radio Station would be a **“C” Regain client**.
- A Client who has never advertised on the Radio Station but has R70,000 p/a available would be an **“A” G ain Prospect**.
- A Client who has never advertised on the Radio Station and has R30,000 p/a available would be a **“B” Prospect to Gain**.
- A Client who has never advertised with the Radio Station and has only R15,000 available would be a **“C” Prospect to Gain**.

These examples on the slide help indicate how using criteria you can help slot your clients and prospects into the right columns. In Module 2 more will be done with Criteria.

CATEGORY	USERS (Clients)		NON-USERS (Prospects)		SUSPECT
	RETAIN	DEVELOP	REGAIN	GAIN	
High Yield & Larger Investment A Possible Radio Adv. Budget P/A R 48K +	55K 70K	6K 70K	0 70K	0 70K	Pro-Active & High Relationship Selling
B Possible Radio Adv. Budget P/A R 18K - R 48K	24K 30K	6K 30K	0 30K	0 30K	
C Possible Radio Adv. Budget P/A Under R 18K	12K 15K	2K 15K	0 15K	0 15K	Future & Lower Relationship Selling

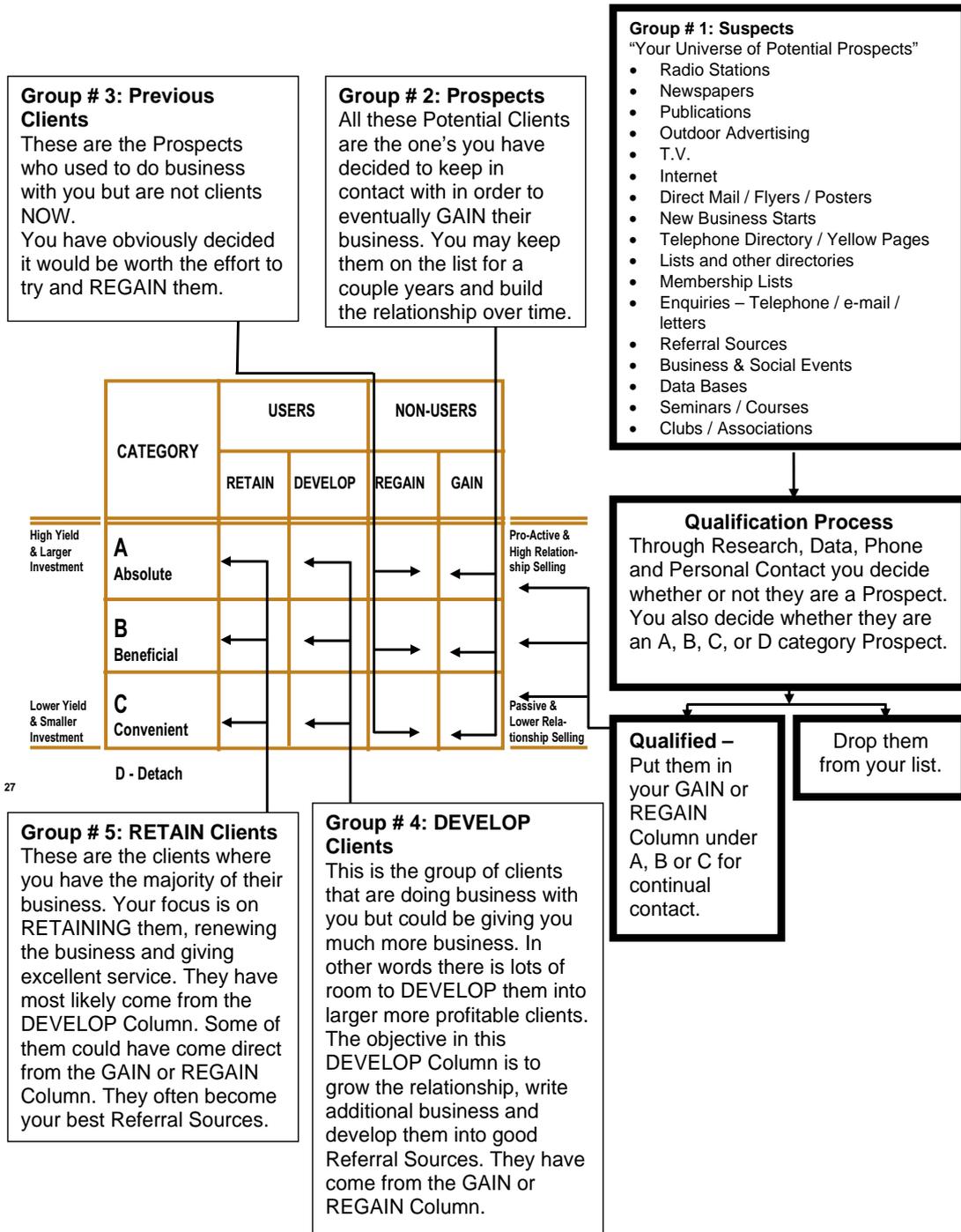
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Slide # 8

Figure #1

The ABC's of Targeting

Pro – Active Model Review



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Retain, Develop, Regain, Gain Explored Further

1. Retain - A & B Clients

80% of sales or profits come from 20% of the clients. This rule of thumb in sales is usually quite accurate for most companies. This is that group of clients that are already big contributors to your sales or bottom line. The executives of these organisations are often the ones you find as invited guests to special functions and sports boxes (Rugby, Soccer, Football, Ice hockey) throughout the year by your company. They are considered VIP clients. A company cannot afford to lose any of these clients. It may take several new clients and a large investment to replace this loss. The main focus with this group is to retain them through excellent customer service, loyalty programs and maintaining a close relationship with them. The down-side of putting all your focus on this group of clients is that the majority of them may be at their maximum in relevance to services and products provided by you and your company. Companies and/or salespeople who put all their effort into these clients often find that sales flatten out or decline over time.

2. Develop - A & B Clients

These are clients or customers who are light users of your products or services but are big users within the industry. In other words they may do a fair amount of business with your competitor or have potential for big growth in the coming months and years. The goal is to develop this group. This is done through Add-on, Up-sell, Cross-selling and other methods of getting clients to use more of your services and products. There is some focus on loyalty programs but there is a big thrust on business building with this group. A relationship of some type is already in place with most clients in this group. This should be the easiest group from whom one could generate a sales increase.

3. Regain - A & B Clients

Clients and customers leave us for many reasons. It could be that there has not been a need for a while, possibly there was poor service or no follow-up, the competition may have enticed them over, or their favourite sales representative left your company. The clients you want to regain are past clients or existing customers that have cut down on the percentage of business that they do with you. They are the ones you identify as worthwhile putting the time, energy, ability, money and reputation into, to rein the business. This group has had some experience with you and/or the company so they are familiar with you. This is often the toughest group because in most cases, some type of relationship exists but the chances are it might have been negative.

4. Gain - A & B Clients

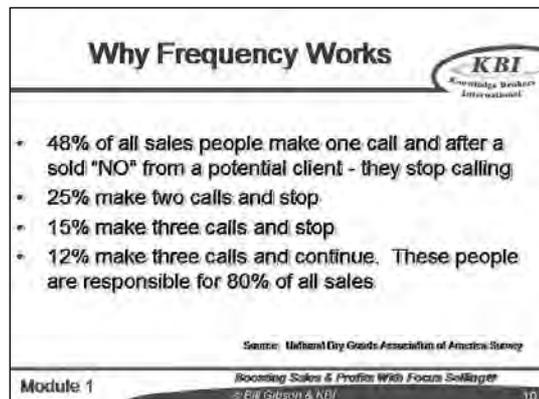
This is that group of clients who have been non-users of your products and services in the past and in the present. They are non-users who have proven to be big users or buyers of similar services and products with your competitors within your industry, or non-users with big growth potential just entering your buyer group and who do not deal with your competition. The objective is to gain them.

5. Suspects

This is the "Universe of Potential Clients" that you have decided to make contact with to qualify whether or not they should go on your GAIN List.

Frequency Works!

Did you know that you never chose to speak the "mother language" that you speak. What happened was that other people continued to frequently repeat words and sentences to you that you frequently repeated over and over again as a child and eventually you spoke the language. We learn through repetition and through frequency. Relationships are developed through frequency. Persistent contact with specific Prospects offering genuine assistance and solutions is one of the keys to Gaining business and one of the keys to Developing, Retaining and Regaining clients.



Why Frequency Works

- 48% of all sales people make one call and after a sold "NO" from a potential client - they stop calling
- 25% make two calls and stop
- 15% make three calls and stop
- 12% make three calls and continue. These people are responsible for 80% of all sales

Source: National Dry Goods Association of America Survey

Module 1

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"It is better to reach 50 of the Right Prospects and Right Clients 20 times with the Right Methods and Right Solutions than it is to reach 1 000 Prospects and Right Clients once."

The following statistics indicate the importance of frequency in gaining, developing and keeping clients: The National Dry Goods Association of America discovered the following results through a research project with a large group of sales representatives in their industry.

They discovered:

- 48% of all salespeople make one call to a prospective client and after one solid “NO” from that potential client they stop calling.
- 25% of all salespeople make two calls to a potential client and stop calling after two solid “NO’s”.
- 15% make three calls and after 3 solid no’s from a potential client they stop calling.
- 12% of all salespeople make three calls, get three solid “NO’s” and still continue to call on the potential client. These people are responsible for 80% of all sales in that industry.

Another commonly used set of figures often used in sales training also backs up the frequency principle in selling. These figures are based on a Sales Conversion Ratio.

It goes something like this. If you were to survey 100 clients who are now with your company who used to be clients of one of your competitors and they switched to you because of the number of sales contact with them, the conversion figure would resemble the following:

- On the 1st call to the 100 competitor’s clients, 2 of them would have converted to your company.
- On the 2nd call to the 98 that are left, 3 of the 98 would have converted to your company.
- On the 3rd call to the 95 that are left, 4 of the 95 would have converted to you.
- On the 4th call to the 91 that are left, 10 of the 91 would have converted to you.
- From the 5th call and onward, is where the 81 who are left would have converted to your company. 81 % of all conversion business comes from the 5th call and onward.

This could mean it may have been 25 sales contacts over 2 years before number 100 finally said yes and converted.

As you can see, if it takes 25 sales contacts over 2 years to convert a C Prospect, we cannot afford to have too many of them if we respect our Time, Energy, Ability, Money and Reputation.

If it takes 25 sales contacts over 2 years to convert a AAA Prospect, it was worth the effort.

Again, if it takes 3 contacts a month to keep a C Client happy, you can’t afford to have too many of them. If it takes 3 contacts a month to keep an A happy, it still will be profitable.

This is why we say focus on the right Prospects and Clients with the right frequency.

Calls	Converted	Percentage
1st	2	2%
2nd	3	3%
3rd	4	4%
4th	10	10%
5th and Onward	81	81%

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CATEGORY	USERS (Clients)		NON-USERS (Prospects)	
	RETAIN	DEVELOP	REGAIN	GAIN
A Possible Radio Adv. Budget P/A R 48K +	55K 70K	6K 70K	0 70K	0 70K
B Possible Radio Adv. Budget P/A R 18K - R 48K	24K 30K	6K 30K	0 30K	0 30K
C Possible Radio Adv. Budget P/A Under R 18K	12K 15K	2K 15K	0 15K	0 15K

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The 5 Relationship Development Stages

It is very difficult to build a personal or business Relationship without “frequency of contact”.

At KBI we have been able to identify 5 Stages of Relationship Development that a relationship goes through whether that be a personal or business relationship.

Figure 2 - The 5 Relationship Development Stages describes the 5 stages of relationship development we go through.

The stages are:

Stage 1	The Attraction Stage	“Watching”
Stage 2	The Exploration Stage	“Testing”
Stage 3	The Development Stage	“Bonding”
Stage 4	The Commitment Stage	“Trusting”
Stage 5	The Unity Stage	“Entrusting”

Within **Figure 2 - The 5 Relationship Development Stages** the author has indicated the following

- General Characteristics of the Buyer / Seller Relationship at each stage.
- The Buyers Characteristics and Behaviours at each stage.
- The Sellers Characteristics and Behaviours at each stage.

To help relate the “learning model” to your personal life we’ve also included a brief description at each stage in your Friendship Area of Life and Intimate Relationship Area of Life. A “Truth Principle” should have many uses when it comes to relationships and the 5 Relationship Development Stages is a Truth Principle. It works in other areas of your life. The following example shows that.

Relationship Stage	Friendship Relationship	Intimate Relationship
1. Attraction “Watching”	A Stranger	Flirtation
2. Exploration “Testing”	An Acquaintance	A Few Dates
3. Development “Bonding”	An Associate	Steady Dates
4. Commitment “Trusting”	A Friend	Engagement
5. Unity “Entrusting”	A Best Friend	Marriage



Take a few minutes and study **The 5 Relationship Development Stages in Figure #2**. Observe what you think are the key issues or behaviours the Buyer has at each stage and the vital behaviours and characteristics that the seller must demonstrate at each stage. Following are a couple of key things that we think are vital for the Seller at each stage.

Stage 1: Attraction Stage

- Demonstrate Your Uniqueness. If you are the same as everyone else why should they change suppliers, agent etc. or even consider going forward with you.
- Respect boundaries. You may be outgoing and open but you may be interacting with someone who is not so open and is cautious.
- Do lots of listening.
- Utilise frequency of contact and / or frequently be where they will be.

Stage 2: Exploration Stage

- Be innovative and resourceful. Go the extra mile.
- Keep commitments, even the small ones. You are being tested.
- Clarify specifications, procedures and expectations.
- Super service and under promise and over deliver.
- Continue with the frequent contact in order to move to the next stage.

Stage 3: Development Stage

- You prove your abilities and keep promises
- You and the buyer start to open up more on the personal level.
- You network internally with their support people and family in selling to individuals.
- Gain momentum.
- Keep up the frequency of contact.

Stage 4: Commitment Stage

- You should now really know the decision making process.
- Anticipate the clients’ needs even before they know.
- You understand the politics and the players.
- You should now have a history of success which brings trust.
- You are committed to the relationship.
- At this stage is where the quality referrals are.
- Continue with frequency to continue the relationship building.

Stage 5: Unity Stage

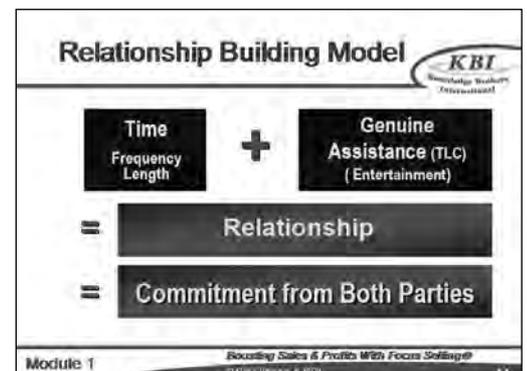
- At this point you take on leadership roles with them to get the job done.
- You become totally immersed and will be seen as a close associate of key people. Whether you like it or not, you are politically involved. Tread lightly!
- You are in the inner circle.
- You seek complete solutions that are broad and deep.
- Your clients become your best marketing people. They are on your team. More referrals!
- You will still need frequency of contact to keep the competition out!

Frequency and The 5 Stages of Relationship Development

You can now see the reason why “frequency of contact” is important. You need it to develop a relationship. We cannot get to the Commitment Stage and the Unity Stage in a couple of meetings or encounters. AAA Referrals come at these two stages.

Time and Genuine Assistance “Relationship Building Model”

Continually visiting, phoning and contacting some buyers can be very annoying for them. The key is this. Every time you make a contact with someone, be of value, add value, add ideas, concepts and information and / or entertain them or give a positive experience they will remember. (Slide #14)





The 5 Relationship Development Stages Slide 13 – Figure #2

	 ATTRACTION STAGE <i>"Watching"</i>	 EXPLORATION STAGE <i>"Testing"</i>	 DEVELOPMENT STAGE <i>"Bonding"</i>	 COMMITMENT STAGE <i>"Trusting"</i>	 UNITY STAGE <i>"Entrusting"</i>
FRIENDSHIP	A Stranger	An Acquaintance	An Associate	A Friend	A Best Friend
INTIMATE	Flirtation	A Few Dates	Steady Dates	Engagement	Marriage
BUSINESS	Potential Supplier	Short Term Supplier	Developing Supplier	Trusted Long Term Supplier	Trusted Advisor and Friend
GENERAL CHARACTERISTICS OF THE RELATIONSHIP	Maybe some interest. Little known about each other.	Explore each other. Begin to set procedures for contact.	Social distance reduced. Mutual understanding increases. Individuals in both firms develop relationships. Trust begins.	Commitment. Long term planning. Staff & Management of both Companies. - Cross Talk - Cooperative planning & problem Solving } WIN/WIN	Complete trust. Unity in doing business. Genuine partnership at all levels of both companies. Total immersion and cooperative level of Key Account Relationship.
THE BUYER'S CHARACTERISTICS & BEHAVIOURS	Shows interest. First impressions are important. Wants more information. Assesses seller's character. Assesses seller's knowledge. Wants to see what is unique or different. Is it worth some time and energy?	Tests seller and seller company for the future. Commitment is still low and short term. Shares more information. Sees the seller more clearly. Future direction of the relationship is determined.	Personal relationships grow. Increase purchases. Begins to trust. More open.	Long Term commitment has been made. Shares big picture. Seller is regarded as a resource to the company. Confident in the relationship Trust	Complete understanding of the relationship. Priority –R etention of supplier. Seeks strategic business advice. Open and Honest.
THE SELLER'S CHARACTERISTICS & BEHAVIOURS	Shows focused attention. Displays a uniqueness. Professional behaviour. Establishes commonalities. Product knowledge expert. Asks questions. Listens. Respects boundaries. Projects good image. Tries to 'be seen'. Honest. Keeps even the small commitments. Establishes credibility. Utilizes referrals. Utilizes frequency and genuine assistance. Good Follow-up.	Clarifies specifications, procedures and expectations. Proves long term intentions and abilities. Super service. Innovative and resourceful. Develops and shows deeper understanding of buyer, buyer's business and buyer's needs. Keeps commitments. Honest. Prompt attention to problems. Under promises – over delivers.	Proves abilities and keeps promises. Gets closer to the buyer. Big growth in knowledge of client. Focused on results. Networks internally. Cross sells. Customer service audits. Gains momentum.	Knows decision making process. Utilizes team support/team selling. Anticipates client's future needs. Adds real value. Understands politics and players. Expands service/product. History of success. Long term planning. Committed.	Leadership. Totally immersed. Knows client strategies. Inner circle. Politically involved. Anticipates and seeks complete solutions –b road and deep.



The Relationship Building Model

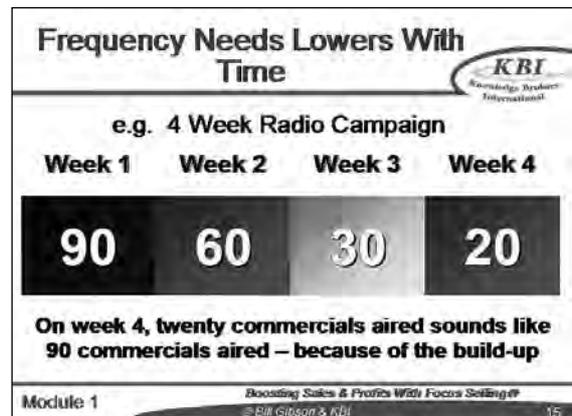
Time (Through frequency of contact or extended periods of time with someone - e.g. Golf, dinner, etc.)	PLUS	Genuine Sincere Assistance (Real help, tender loving care or entertainment)
	EQUALS	
A Relationship of One Degree or Another		
	WHICH EQUALS	
A Commitment from Both Parties		

Combining frequency of contact with Genuine Assistance or entertainment is the key when building and keeping relationships.

The Need For Frequency of Contact Lowers With Time

One concern some people have vocalised, is that if you give someone lots of attention through frequency to get their business they will expect the same attention forever. This then stops you from expanding because of lack of time.

It does not work that way. If you are a listener to a radio station or viewer of a TV station and 90 commercials run the first week and 60 run the second week, the 60 will sound like 90 on the second week because of the frequency build up. The 30 commercials on week three and 20 commercials on week four, will also sound like 90 because of the number of times the commercial would be heard in the previous weeks.



The same applies with sales calls and sales contact. The heavy frequency in the beginning sets it up so that lighter contact later feels like it is heavier than it is.

Other Uses for the ABC-Retain, Develop, Regain and Gain Model

The following two slides indicate a few of the additional uses for the ABC - Retain, Develop, Regain and Gain Model. It can be of great value in your business and personal life. Quality of business and quality of life comes from focusing your Time, Energy, Ability, Money and Reputation on the right people, the right circles and right networks. The ABC - Retain, Develop, Regain, Gain Model does that.

The ABCs of Targeting Model Can Also be utilised for Other Areas of Your Life and Business

- Your network / lead sources / lead referral contacts:**
Categorising and prioritising important "Contact People" who can influence you receiving business or receiving A and B type referrals.
- Very large account selling and key account management:**
Categorising and prioritising who to focus on when there are a number of different people within an organisation that you need regular contact with

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The ABCs of Targeting Model Can Also be utilised for Other Areas of Your Life and Business

- HR Plan for management:**
Categorising personnel for retaining, developing, regaining and gaining productive people
- Your personal and / or corporate "be seen" strategy:**
Categorising and prioritising which associations to belong to, events to attend, social circles to invest time and energy in etc.
- Your personal circle:**
Categorising and prioritising your friends, relatives and associates who you wish to invest time with

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Retain, Develop, Regain and Gain Strategies

There are subtle differences between the Retain, Develop, Regain and Gain Strategies. Following are a few Strategy tips listed under each strategy separately for more effectively dealing with your A's and B's especially.

The Retain Strategy

Some of the strategies and tactics that can assist you with your Retain Clients are:

- Proactive Servicing:**

With your larger more loyal clients it is not good enough to say, "call me if you need me". Be pro-active in contacting them and offering additional solutions and assistance. Don't let apathy set in.

- Incentives for Loyalty:**

An A or B client who has been loyal to you deserves special prices and special concessions. Be sure to offer those incentives to this Retain group of clients.

- **Special Treatment:**

Invitations to functions, gifts and free tickets to events would fall under special treatment. Look for ways to give special treatment especially to your A and upper B accounts.

- **Frequency of Contact:**

If we were competing with you and calling on an A Retain client of yours the first question we'd ask is how often does he or she contact you. Once we've gotten the frequency level ... we then would plan to see that client more often than you. It requires frequency of contact to keep the relationship in tact and keep out the competition. Your associates and support people can be part of that frequency of contact as well.

- **Relationship Building:**

Be sure to look for ways to put time into the relationship through a combination of frequency and more lengthy contact like having dinner, playing golf or attending an event.

- **Some Developing:**

If a client is in your Retain column, you will most likely be receiving the majority of his or her business. There will continue to be room for some development or opportunities for new business in other areas with the client. Be conscious of still looking for ways to do some developing.

- **Close Monitoring:**

Especially with your A Retain clients it is important to closely monitor the relationship and be alert to any kind of situation that could negatively effect the relationship and be prepared to move to immediate action. One of the ways to stay on top of these relationships is to consider the use of a Risk List. We suggest to sales managers and business owners that every salesperson, executive or owner have a risk list to enter client's names on. Then at the weekly meeting, if it can wait that long, the Risk List is reviewed and action plans be put in place to ensure the relationship doesn't deteriorate and / or the client stays loyal to us. Following is a number of situations or reasons that indicate why a client may pull away from us or want to stop doing business with us.

Risk List (Reasons Why The Relationship Could Deteriorate)

Political Differences Between Two Companies: An example of this could be a partner or senior executive is quoted in the media on an issue which is opposite in opinion as to that of a AAA client. It could risk the relationship.

Another example could be a take-over by another company that is seen as more English and the client is a staunch Afrikaner who always liked dealing with your company because it was very Afrikaans. The key here is to recognise it and implement a plan of action before it is too late.

When Santam took over Guardian we were doing some work with Santam. An action plan was put together to identify those Brokerage Firms and Large Clients who may be upset. There were Brokerage Firms and Clients that had left Santam at an earlier stage and went to Guardian and now Guardian was owned by Santam. Some of those Companies had preference for Guardian because of the English slant to Guardian. On the other side, there were Brokerage Firms and Clients who left Guardian to go to Santam and now some of the Guardian offices with the new name Santam were back looking after them. Some of these clients also preferred the Afrikaans driven company. This is a "real world" example. The same could happen with a none Black Empowerment company now dealing with a client that has recently been taken over by a Black Empowerment group.

Poor Service:

If an A or B client had poor service and it wasn't addressed you risk losing the client.

Competitors Aggressively Pursuing Them:

There are times that the competition "pull out all the stop gaps" and really go in pursuit of specific clients. This definitely puts the relationship at risk. This is a time business owners and sales managers and executives put their efforts together to equal or better the competitions efforts.

Turned Down For Additional Credit Or Other Services:

This is where a client has been turned down for additional credit, or in an insurance brokers case a client has been turned down for insurance coverage of some type. It could also be specific concessions requested by a good client that you cannot or will not meet or a request for a certain service, volume of an order or needing something by a specific deadline that you cannot deliver. These situations put the relationship at risk and opens the doors for the competition to entry. This is where management and the salesperson increase the frequency and concessions and service in other areas to counter-balance it.

Unhappy With The Price, Rates Or Premium Payments:

Everybody would like better rates or prices but in this case it is the client that has a genuine concern and has been making a noise about it for quite some time. Management needs to get involved and come up with a Win / Win solution or you could lose the client.

Have Not Been Visited For Quite Some Time:

If a good client has not been seen for too long a period of time the relationship can be at risk. Increase your frequency level, apologise and get various levels of management involved.

Change In Their Management:

This is where a key person in management at the client company has been promoted or moved to another position or they have left the company and you had a good relationship with him or her. It is quite possible that you will have lost a Unity Stage Relationship and will end up at the Attraction Stage with the new person. It is also possible that your competition may have a Commitment or Unity Stage Relationship with

the new person, from the new person's previous job or position. You need to build the relationship quickly. If the relationship between the previous person and the new person is good then the support of the previous person can help. If not, invest time and genuine assistance and treat the new person as a GAIN client and do what it takes including the support of your management team. A new needs analysis of the new persons wants, desires, needs, direction, goals and agendas needs to be done quickly. Be a helper and supporter to that person.

Change In Sales Representative Handling Them:

If your company has a sales representative who leaves your company, the A type clients are at risk of leaving. That person's account list is now susceptible to competitive entry. Management needs to pay special attention to these clients while the new sales representative is building the relationship and building credibility.

Not Enough Personal Attention:

Apathy often sets in on relationships with good clients and salespeople forget to continually pay personal attention to these clients that at one time they literally lived with to build the relationship. Periodic review of the client list with an accurate assessment of the service level can help.

Note: Brainstorm with your partners, associates and other salespeople to determine other factors that could put a company or salesperson at risk of losing an account.

The Develop Strategies

Following are some of the strategies and tactics for Developing your clients – especially the A's and upper B's.

- **Needs Analysis:** If the client is in the develop column there is a good chance you are receiving only a small part of the potential business he or she could give you. Do a thorough analysis of the clients:
 - likes
 - dislikes
 - fears
 - beliefs
 - problems
 - achievements
 - dreams
 - challenges
 - objectives
 - values
 - goals
 - motivations

This information will indicate the areas of potential growth and will also help you develop the relationship through better personal service.

- **Add-ons, Up Selling and Cross Selling Strategies:** Look for areas that you can add-on, up sell and cross sell your products and services with the client. The end of Module 9 – Closing The Sale is devoted to maximising additional sales. Implement those skills, processes and tools.
- **Pro-Active Selling & Servicing:** With the Retention Strategy it was Pro-active Servicing. With the Develop Strategy it is also Pro-active Servicing but you must add Pro-active selling. This means you need to be Pro-active in identifying the buyer's needs and offering those solutions.
- **Relationship Marketing:** As with the Retention Strategy you need to continually look for ways to build the relationship. It will require time plus genuine assistance to accomplish that.
- **Special Treatment:** Identify those A's and B's that you want to treat as if they are already A & B Retain clients. Put these people on your VIP list. Invite them to functions, give them value added gifts, ideas and tools. Be pro-active with special treatment.
- **Frequency of Contact:** It requires frequency of contact to develop a relationship or receive the majority of someone's business. Keep up the frequency (repetition) of contact.

The Regain Strategy

This is where you want to Regain a relationship or client that you and / or your organisation has lost. Following are some suggestions on how to "renew the relationship".

- **Presenting Something New:** We often lose clients because we couldn't deliver what they want or they were unhappy with the type of service they received or who they had to interact with. A great way to renew a relationship is to show them you have changed. Approach them with something new that will entice them to consider doing business with you again. It could be:
 - new products
 - new salesperson
 - new management
 - new processes
 - new ideas
 - new thinking
 - new policies

The objective is to get them to give you another chance to prove you've changed.

- **Correcting Situations And Being Humble Where The Relationship Ended Due To Problems:** "It is never too late to say you are sorry". Don't be afraid to apologise on behalf of yourself or on behalf of someone else, your company or your industry. Apologies show strength not weakness and it demonstrates good intent. Back up your promises with action. Don't fall into the trap of arguing about what happened in the past and who's fault it was. Be humble.
- **Frequency Of Calling:** "If your company was the last company on earth, I wouldn't do business with you people because of how you let me down in the past". We've all heard statements like this from clients or we've said them ourselves. You are dreaming if you think one or two visits and an apology will bring someone back to you. You need to continue with the frequency of contact and adding value each time. In most cases the results will eventually be the client giving you another chance.

- **Making Them Part Of The VIP Strategy:** Once you've got them to a neutral position and at a point where they won't be aggressive about talking about the incident they were unhappy about, you make them part of your VIP Strategy. This way they are treated as if they are already an A client in the Retain or Develop Column.

The Gain Strategy

The following strategies and tactics will help in Gaining Clients.

- **Be seen Where These Potential Clients Are Present:** Once you know what your Ideal Prospect and Ideal Client looks like identify the type of associations, organisations, events and establishments these people would frequent. Launch a "Be Seen" program so that you meet these people. (Module 2 can help with an Ideal Client or Ideal Prospect description.)
- **Utilise Frequency Of Contact And Be Of Real Help:** With these people you will be at the Attraction, Exploration and Development Stage so it will require frequency of contact and genuine assistance to develop the relationship. Have a system of follow-up and pre-planned things you can do to add genuine help and assistance. Get your frequency level of contact and real help higher than the competition.
- **Utilise Your Network For Introductions And Referrals:** Your best network contacts are clients and associates you are at the Commitment and Unity Stage with. Draw on these people for introductions and referrals. They can help accelerate the relationship development because of their credibility with the people they refer you to. Be sure to keep your network contact in the loop as to the results you've had with the person they referred you to. Look for ways to make your relationship with your network contacts win / win and not a one-sided taking relationship from you.
- **Continual Prospecting:** To Gain business you need to Continually Prospect. The pipeline must be kept full. Decide the number of prospects you want to continually have on your GAIN List that you are continually contacting and building the relationship with. The first part of Module 2 explores Continual Prospecting further.
- **Be A Professional At Rapport Building:** Become a person that has mastered the Art of Rapport Building. This is vital when attempting to gain clients. Module 3, 4, 5 and 6 will be extremely helpful in Rapport Building.
- **Be Unique:** Discover your own uniqueness and that of your products, services and your company. At the Attraction and Exploration stage you need to display some uniqueness, special expertise and a different and valuable way of doing things to convince the Prospect to want to continue investing time and energy into the relationship. Also respect boundaries. Know what the prospects boundaries look like and respect them.

Note: As you can see, there are similarities within the four strategies such as Frequency of Contact although there are subtle and unique differences. Once you've categorised your clients and prospects into the Retain, Develop, Regain and Gain columns these Retain, Develop, Regain and Gain Strategies can be used as a guide and "mind jogger" as to how to handle the clients and prospects.

In Module 2, there will be more on categorising your prospects and clients by utilising criteria.

Additional Gain Strategy Tips

Following are a few additional suggestions on Gaining Clients.

Identify the potential clients/customers in the market place who could meet your A-group and top of B-group criteria. Put them on your **GAIN** list.

You may identify these people or companies by doing the following:

1. Study your top competitors and enquire through your network of clients, suppliers, business associates and other salespeople as to:
 - Who their Top 50 clients are
 - Which high profile clients they have
 - What industries or areas they are focusing on
 - Who is unhappy with their service or productsThrough this process you will identify prospects who could be big users of your services or have a positive affect on your business if you had them as clients. Put them on your **GAIN** list.
2. Become more active in associations, organisation, events and social functions where potential clients may be, who would meet the criteria of your A and B-group. (We will cover more on criteria in Module 2.) As you meet or hear of these potential new clients/customers put them on your **GAIN** list.
3. In some businesses it may pay you to do an **Awareness** walk or drive in your community to comb the market, noticing new businesses and changes with older businesses.
4. This always turns up top potential clients/customers. Most of us cannot tell another person which businesses are situated on the road we drive to work on everyday. By focusing you become aware. Once again think A & B-group criteria or key influence.
5. Make a point of clearly describing to your business associates, network, family and friends what your criteria are for an A-group or B-group client. You will be amazed how many people can direct you to a potential A or B group that you can enter on your **GAIN** list. (In Module 2 we have examples of An Ideal Client or Prospect)



6. With the use of criteria to help you spot a good suspect or prospect, look through the following for potential clients who may meet the A-group and B-group criteria.
 - Association Directories - bar associations, transport associations, architect association. There are association directories on every kind of industry and profession in the world.
 - Business and personal directories published by an independent company.
 - Newspapers - Articles that may tell of expansions, new business stands, change in management, announcements and advertisement.
 - Journals, Magazines and specialty publications
 - Awarding of **Bid** announcements
 - Advertising for additional personnel in Help Wanted
 - Trade Fairs and Conventions where potential clients may be, and network.

The Principles Work –Case Studies

- **Cobus van Graan**, a previous senior associate with Knowledge Brokers and now a distributor through his company Scientia Performance Consultants (Pty) Ltd once worked for Eli Lilly. He was in charge of managing a sales force of key account pharmaceutical representatives here in South Africa who called on doctors. Their main focus was a product that could help cancer patients. At that time the doctors had an understanding with pharmaceutical reps that they only get visited by those reps once every three months because the doctors were busy people. Therefore the reps only visited once every three months. Cobus said, this is nonsense, we will see them once a week ... but every time we will add value. They began the process and added value through doing things such as:
 - giving tickets to them for popular entertainment events
 - gifts such as wine
 - researching the web internationally and bringing solutions to specific problems
 - bring case studies
 - giving useful helpful information to help the receptionist
 - demonstration for nurses to give needle injections in a less painful way... the list goes on and on and on!

In a very short time the doctors would want an explanation if they did not see the rep each week. What a change!

In 6 months Cobus and his team went from 25% of the share of market to 75% of the share of market in the "cancer treatment" product category they were competing in. Frequency Works!
- **Clive Sinclair** a Financial Adviser from Fish Hoek contacted me (Bill Gibson) 12 times from August to December of 2002 and even when I was in Canada for 6 weeks. He closed me for 3.5 Million Rand in Live Cover in December and another 3 Million a few months later, plus Greenlight Medical Coverage and Disability Coverage. Clive's persistence and relationship building skills had me at a point where I felt an obligation to do business with him. In 2002 I spoke to over 2 000 Financial Advisers in South Africa. 5 of them followed me up to see if they could be of service. 4 of them gave up between one and 3 contacts with me. Clive continued. He got the results! Frequency works!

- Following is a letter to **Shane Gibson** on October 21, 2002, from Mike Chiu a participant who attended a 4 Part Sales Series workshop with Shane in Vancouver, Canada. Frequency Works!

Shane,

I would like to take the time to thank you for the knowledge and expertise you passed along in the 4 part seminar you put on through the Vancouver Board of Trade. Many of the skills and ideas you taught were common sense, but your application of these concepts towards building and maintaining a solid client base has been instrumental in my recent success.

One example of this success is with a potential client I had been trying to do business with for almost two years. I work in construction finance, and specifically, I arrange mortgages for the development of seniors care facilities and retirement homes. This particular client had been planning the development of a 100,000 square foot facility for some time, but had a very tight working relationship with his bank for many years. I had nearly given up trying with this particular client, until we covered the sales conversion ratio statistics in your program. After this, I called him regularly every other month and explained that I respected his banking relationship, but wanted to be second up to bat in case things didn't work out with his bank. Sure enough, his bank dropped the ball during a crucial period of the predevelopment stage, leaving him \$2 mm short of what he needed. Needless to say, I was the next person he contacted. Within days I had restructured the financing and had another lender lined up to complete the project. We are now looking at our next two deals together!

Thanks again for sharing your insight and practical applications of sales and marketing. I would definitely recommend your program to anyone who wants to build and maintain a dedicated client base.

Yours truly,

Mike Chiu

Senior Associate

REALTECH CAPITAL GROUP INC.

Mike M. Chiu, B.A., M.A.

Suite 1210 –1030 West Georgia

Vancouver, BC V6E 2V3

Tel: 604-684-2201

Fax: 604-662-4818

www.realtechcapital.com

Summary

What we received from this module was as follows:

1. We learned the importance of categorising our Prospects, Clients and Referral Sources into A, B and C Categories.
2. We found out why frequency is the key to building relationships, retaining, developing, regaining and gaining clients.
3. We were shown the subtle differences between the Retain, Develop, Regain and Gain Strategies and some basics on which category a client may fit under.
4. We received details on The 5 Relationship Development Stages and how frequency plays a part in relationship building.

Module 2, will focus on developing criteria so you can identify where your Clients, Prospects and Referral Sources fit into the ABC – Retain, Develop, Regain and Gain Model.

Before going to Module 2, complete the exercises on the following pages.

Boosting Sales & Profits With Focus Selling



Exercise 1: Frequency of Contact

List the names of the most recent clients / customers who have started doing business with you, but were previously doing business with, or who may still be doing business with a competitor of yours. These have to be clients that came over to you because of sales calls or contacts you have made with them including telephone contact and social contact.

Then, take a few moments on each one of these clients and search your mind to identify the number of contacts you made with them before they became clients. This includes introductions, social contact, coincidentally bumping into them, phoning them, sending letters, making proposals, delivering information, sales calls to them and visits from them. Write down when, where, how, and with what you made the contact.

Clients Name	Frequency of Contact Details							
	1 st Contact	2 nd Contact	3 rd Contact	4 th Contact	5 th Contact	6 th Contact	7 th Contact	8 th Contact

Now figure out the average number of contacts it took to convert these clients from the competition to you. It does not have to be that they gave you all their business, it means you got some of it. How many contacts to get the first order?

Clients:

#1 _____

#2 _____

#3 _____

Total _____ / 3 = Average of _____

How did you specifically benefit from this exercise? Did it help confirm the importance of frequency?



Exercise 2: Relationship Development Stages

Review Figure #2 - The 5 Stages of Relationship Development in this Module, and then identify which stage of relationship you are at with three of your prospects or clients. You could use the clients in the previous exercise. Also write down what you need to do to move to the next stage or retain the relationship at it's present stage.

Client	Stage	Action Needed



Exercise 3:

Write the name of an AAA Client under Retain and Develop and the name of an AAA Prospect under Regain and Gain and outline what strategies could assist you in the relationship.

Strategy	Client / Prospect	Actions / Strategy
Retain		
Develop		
Regain		
Gain		

Module 2

Identifying The Right Clients / Markets

Learning And Sales Development Outcomes

In this module you will:

1. Learn about the benefits of Continually Prospecting.
2. Build your own Criteria to help identify the best Prospects, Clients, Referral Sources and Projects to focus on.
3. Identify and Select 2 to 5 Target Markets to Focus on.
4. Build a Prospect List.

*Ntsika Enterprise Promotion Agency,
with a focus of rendering non-financial support to SMME's
is part of The Department of Trade and Industry in South Africa.
Ntsika, along with the support of The European Union
assisted in the Initial Development of the
Boosting Sales & Profits With Focus Selling program
in conjunction with Knowledge Brokers International Limited.*

Module 2 Identifying The Right Clients / Markets

More On Gaining Clients - Prospecting

Continual Prospecting is needed to keep your GAIN Column full of potential clients. Also you need to be Targeting The Right Type of Prospects.

To start this module lets take a look at Prospecting and why it is so important for our business.

What is Prospecting?

What is Prospecting? According to the writers, it is as follows:

'P prospecting is the continual search for past, present and potential clients that are ready, willing and able to purchase product and service solutions for their specific situations and circumstances from you and your business.'

Why do clients leave us?

Whether we like it or not, clients do leave us on a regular basis. Therefore, if we do not continually add new clients to our client base, our client base will shrink and so will our income. There are many reasons why clients disappear from our client list. We have listed a few of them to remind us of how and why this happens and the importance of continually topping up our Prospect List of potential clients.

Why clients leave?

- They move.
- They retire or die or close their business.
- Competitors lure them away from us.
- They were unhappy with the performance of our product or service.
- They believe our price, rates, interest, premiums are too high.
- They were unhappy with a complaint or problem that was not handled well.
- The compatibility with you and the client wasn't there.
- Cannot afford your products and services because of a change in their life or business situation e.g. Marriage break-up, goes out of business, disabled, loss of a job, industry recession, bad investment, poor decisions etc.

We are confident you could add many more reasons why people and companies stop doing business with us. The fact is, we have to continually prospect for new clients and prospect for additional business from our present clients. If we don't, our business will be shrinking rather than growing. A continual updated list of prospects being contacted, is the fuel that keeps the engine of your business working.

In the Life Insurance business, one lapse of a policy (a client stops paying) doesn't require the agent to only contact one new prospect to replace the lost revenue in her business, it requires much more than that! Based on the 15-15-5 rule, it could require her to contact 15 potential clients to land 3 appointments to get one prospect to buy. That is a fair amount of activity! (15-15-5 means: 15 contacts per day to get 15 appointments per week should result in 5 sales.)

Some clients leave us, some cannot place additional business with us and others have to reduce their commitment. This means we won't grow unless we prospect.

In order to survive and prosper, it is important for you to keep a healthy list of several dozen prospects that you are building relationships with and continually offering appropriate solutions to them.

Why do we need to continually prospect?

Following are a list of reasons we need to continually prospect.

- Continual Prospecting helps replace clients we lose.
- In order to sustain and grow our client base and income, we need to continually convert Prospects to Clients.
- New Prospects become New Clients who bring New Referral Networks, who bring New Prospects again. It is the beginning of the Circle of Business Life.
- Continual Prospecting keeps your Prospect List full so that you can quickly move to action when needed.
- When you continually prospect you have less "peaks and valleys" because you are consistently contacting Prospects as part of your daily selling and servicing. It is like keeping yourself "topped up" with water. Your energy stays consistent. When you are not "topped up" you can get dehydrated and lose your energy.
- The more Prospects you have, the more choices you have in who you want to contact.
- You have less reason to 'push' the client, or give inappropriate or incomplete solutions because you have lots of potential clients in the pipeline. You show you are not desperate for business. Prospects are more likely to buy if you are calm, confident and thorough.
- The more often you Prospect, the easier and more natural it becomes and eventually it becomes part of your daily success habits. It becomes a pleasure.



- Prospecting 'actively' provides for the future and 'guarantees' a successful business. You pro-actively take control of your own destiny.
- By continually Prospecting you are always set for and securing tomorrow's sales. You are keeping the sales pipeline full.
- Continual Prospecting can make you a Genius. According to Einstein, Genius is 99% Preparation and 1% Perspiration. Prospecting is sales preparation. You can be a Genius by continually being prepared for the future opportunities by continually Prospecting.
- Continual Prospecting overcomes apathy and boredom. It opens new doors to new people, new horizons, new challenges, new places, new opinions, new circles, new adventures and new knowledge. It adds freshness to you and your business. Breaking new ground opens new horizons and creates excitement, energy, momentum and spirit within yourself and your business. These are important ingredients for continual success. Continual Prospecting guarantees these success ingredients to always be present. These are important ingredients for continual success. Continual Prospecting guarantees these success ingredients to always be present.

Prospecting is the life blood of your business, especially in the early stages of your sales career or business stage. Staring at a blank diary with no one to contact can be demoralising and draining. A plentiful supply of prospects to contact makes life as a Salesperson or business owner both rewarding and enjoyable. By making prospecting a continuous daily habit, you can only succeed.

Making Uncertainty ... Certain

How do you continually walk into the world of uncertainty of selling and be certain of your success?

"You walk into the world of uncertainty on a daily basis, certain of your success by daily practicing the winning habits, principles and attitudes of your profession."

Continual Prospecting is one of those winning habits and principles of being a successful Salesperson or Business Owner.

Prospecting is your Business!

Just in case you do not have a Prospecting Form, we've supplied a sample at the back of this module. Please do Exercise #1 before moving forward.

It is quite probable that two separate companies or two separate individuals in a company may have different criteria for determining what an A, B or C account is. Before going with the process of developing criteria to help you identify the right people and companies to focus on, let's take a look at a few examples of criteria broken into A, B and C segments.

- For example, bank branches may have different criteria because of their markets, even though they may both base it on the annual income of a customer. For instance, if we were to look at the average client size it may look like the following annual incomes.

S.A.	Bank 1 - Johannesburg	Bank 2 - Port Elizabeth
A - Account	R300 000 +	R200 000 +
B - Account	R150 000 - 300 000	R100 000 - R200 000
C - Account	under R150 000	under R100 000

AUTOMOBILE FLEET BUSINESS	Dealer 1 Metropolitan Area	Dealer 2 Rural Area
A - Account	Buy 15 cars + p.a.	Buy 10 cars + p.a.
B - Account	3 - 15 per annum	2 - 10 per annum
C - Account	Less than 3	Buy 1 car

SALE OF BRICKS	Area 1	Area 2
A - Account	Companies doing R20 million + per annum	Builders or Medium Developers executing projects of R5 million per annum or more
B - Account	Medium size Developers and Builders executing projects of R5 - R20 million per annum	Tradespeople or Small Developers executing projects of R150 000 - R5 million per annum
C - Account	Tradesmen, Small Contractors, Do it Yourself - Under 5 million	Do it Yourself - Under R150,000

- Another scenario that also shows the diverse ways to tackle the ABC approach to categorising is shown with an example of two sales representatives selling radio advertising. Salesperson A has 15 years experience with the radio station and handles major accounts like McDonald's, large department store chains and large automobile dealers. Salesperson B has 1 month experience and is a rookie and is in the market place cold calling on smaller businesses and working the left-overs of senior salespeople. They both base the categories on estimated "radio advertising rands" (Dollars, Pounds, etc.) invested in the market place by the business. What may be a C-Account for Salesperson A could make up the entire ABC categories of salesperson B - The rookie.

Radio Station Example:

	Salesperson A	Salesperson B
A - Account	100 000 +	30 000 +
B - Account	30 000 - 100 000	10 000 - 30 000
C - Account	Under 30 000	Under 10 000

The same type of strategy may apply to a company selling computers, postage machines, photocopiers, etc. The outside sales team may focus on mainly A accounts while the pro-active telephone sales team may focus on the corporate C accounts.

The C accounts actually become the entire market that the telemarketers work on, so it would be reasonable for the telemarketers to break this market into their own ABC categories.

Salespeople can also break their A category into 3 groups, AAA's, AA's, A's. This ensures an even stronger focus. Categorising and Prospecting helps with decision making and setting priorities.

- An example of breaking A, B, C categories down even further is the example of a Financial Advisor or Insurance Representative basing categories on annual income

Category	Sub-Category
A 150 000 +	AAA 300 000 + AA 200 - 300 000 A 150 - 200 000
B 40 - 150 000	BBB 110 000 - 150 000 BB 60 000 - 110 000 B 40 000 - 60 000
C Under 40 000	CCC 30 000 - 40 000 CC 20 000 – 30 000 C 20 000 or less

Your company may want to categorise certain Industries like the example below.

- For example a company selling software programs, consulting and computers may take this approach. The two examples below show how the industry approach works.

Computer Industry	Banking Industry
A - Industries: Insurance Industry Banking Industry Government Department Store Industry	A - Accounts Estate Agents Lawyers Group Schemes Brokers Bond / Mortgage Brokers
B - Industries: Hospitality Industry Manufacturing Printing or Publishing Smaller retail chain Industry	B – Accounts Professionals on the Books e.g. Doctors, Dentists, Architects, Accountants
C - Industries: Construction or Independent Retailers Other Service Companies, etc.	C - Accounts Business Owners – Small Business

The companies within the A industries or A professions may then be broken into the AAA, AA, A categories. The key to using this system is to *not* get locked into one way of thinking.

- For example a bank may categorise A-accounts as people with an income of 150 000 or more per year, but that bank may be in the mortgage or bond business. Their main market could be Real Estate Agents. Most of the real estate agents may not use the bank's services personally but are influential in referring people who need to borrow the money. Therefore the banker should look at who the top producers are in the industry and place these agents in the A category.

So the lesson here is to make sure you put people who can steer business your way, in the A category, if appropriate. They would be viewed more like brokers. A person also gives you referrals which would be called Referral Sources or Network Contacts. A top architect in your city may have a major influence on where a hotel chain buys their bricks for a large project. The architect may not be the final purchaser but he or she influences by specifying which suppliers to use.

- Life insurance companies can invest a fortune in advertising the brand name of the product to the public and not take the time to determine who the top Independent Agents and Brokers are in the country. The Agents or Brokers have the major influence over the end buyer. The life insurance company needs to recognise this, treat the Agents as clients, and break these Agents into ABC categories and put time, energy and money where they can get the best return.

Brand advertising and marketing can support the Agent but not replace the Agent. Budgets and time and energy should be invested appropriately.

Q: The question is, "Why have we taken the time to look at the ABC method so closely and where and with whom are you investing your personal assets?"

A: Your personal assets are Time, Energy, Ability, Money and Reputation and by using them properly you will enhance your Return on Investment.

Selling To Individuals Examples

Measurement	Salespeople that might use this method
Personal income levels A - 250 000 + per year B - 100 000 - 250 000 C - under 100 000	Real estate Life insurance Financial services Automobile sales Furniture or Appliances Travel
Size of family A - Full nest B - Single parent C - Individual	Holiday Resorts Advertising Agencies P C Software and Hardware company
Age of buyer A - 50 + B - 40 - 50 C - under 40	Car Companies Time share companies Sports companies Golf, rugby, cricket, etc. P C Companies
Influence power A - Could refer 10 or more B - Could refer 2 - 9 C - Could refer 1	Beer and alcohol companies Clothing companies Banks Motor Industry

Following are a few other examples of who may use certain criteria to help determine who an A, B or C may be. This would be salespeople focused on selling to individuals.

Selling To Business and Resellers and Projects Examples

A few examples of A, B and C Criteria for selling Business to Business are listed below.

- Amount of crafts that could be purchased annually by a retail store or re-seller. A small **Craft Co-operative** could use this:
 - A - R48 000+
 - B - R12 000 – R48 000
 - C - Under R12 000
- Amount of annual cleaning contracts they could utilise us for. **Cleaning and Janitorial Company** could use this:
 - A - R300 000+
 - B - R120 000 – R300 000
 - C - Under R120 000
- Number of Security Guards they could employ monthly. **Security Companies** could use this:
 - A - 10 or more
 - B - 4 to 9
 - C - 3 or less
- Size of projects being executed. **Building contracting companies** may use this measurement:
 - A - 10 million plus projects
 - B - 2 – 10 million projects
 - C - Under 2 million projects
- Number of units purchased or leased annually at any one time. **Car dealers** may use this measurement:
 - A - 10+ per annum
 - B - 3 – 10 per annum
 - C - Under 3 per annum
- Amount of direct consumption annually. **Oil / gas companies** could utilise this approach as a measurement:
 - A - 1 million gallons plus per year
 - B - 100 000 to 1 million gallons
 - C - Under 100 000 gallons
- Number of Executives who travel. **Hotel, Travel Agents, Rent-a-Car Companies, and Airlines,** could use this method:
 - A - 20 regular travellers or more
 - B - 3 – 20 regular travellers
 - C - Under 3

- Number of retail outlets. **Consumer Goods Companies**, Meat or Fish or Chicken Producing organisation, Dairy companies, Soft Drink companies:
 - A - 20 or more stores
 - B - 2 – 20 stores
 - C - 1 store

Identifying The Right Prospects / Clients

We are going to share a process with you to help you identify and target the right prospects and clients so that you can maximize your return on investment of your time, energy, ability, money and reputation. It will be accomplished by you focusing as often as possible on the Right type of Prospects when you need to gain new business and focusing on the Right Clients in retaining and developing clients.

The 4 Step Process to Targeting & Categorising Clients / Prospects / Referral Sources

Step 1

Decide which segments or groups you consider to be the market segments you will be focusing on. The examples below indicate some of the types of segments that companies and salespeople focus on. Tick the boxes for the ones that best describe your segment markets.

Segment	Who	✓	Source Page #
Individuals	Any company or individual that sells directly to individual people.		27
Businesses & Organisations	Any company or individual that sells directly to businesses and organisations		32
Referral Sources People	Those that need to focus on individual contacts to receive referrals and introductions from those contacts. (Referral Sources)		38
Individual Influencers within Organisations and Key Account Companies	Any individual that deals with several individual influencers within large organisations and key account companies and needs to have the co-operation or influence power of those individual influencers.		42
Companies, Organisations and Institutions that are Channels of Distribution as Retailers, Resellers, Distributors, Wholesalers, Brokerage Firms, Agencies and Services Outlets	Those who need to work through or distribute through an organisation or company in order to effectively reach the "end buyers" or "end users".		46
Individual Salespeople, Brokers, Agents and other key people that sell directly to or service the "end buyer" or "end user" on behalf of the Channels of Distribution Companies and Organisations.	Any company or individual who needs the Individuals within the Distribution Channel Companies and Outlets to market, sell or service the "end buyer" or "end user".		51
Projects, Functions, Events	Those who focus on providing services and products directly to Projects, Functions & Events.		55
Other:			

Once you've identified the segment(s) you wish to focus on that best fits your type of selling, you will go to that segment and begin to work your way through the process. (For the Page Numbers of your chosen segment(s) look under the Segment Page # column.) Steps 2 and 3 of the process will be repeated in each segment. The reason for that is that different salespeople and business owners will be working different segments.



Segment: Selling To “Individuals”

Step 2: Brainstorming Possible Criteria

Once you've decided that this is one of your segment focuses then brainstorm a list of possible criteria you can think of that would help you identify which **Individual Prospects and Clients** you would prefer to focus on to do business with. We have included a list of Possible Criteria for **Selling to Individuals** that starts on the next page. On the Possible Criteria Worksheet below, enter your Segment Focus, the date, your name and office location. Then do the following:

1. Brainstorm all the possible criteria for **Selling To Individuals** that could help you focus / target more effectively. (Also draw from the Possible Criteria Examples).
2. By using the Priority Column prioritise the Criteria with #1 being the most valuable.
3. Then go to Step 3.

Possible Criteria Worksheet

Segment: _____ Date: _____

Sales Person / Executive: _____ Office: _____

1.	
2.	
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Possible Criteria “Selling To Individuals”

- **Gender**
(Male or Female.)
- **Age Group**
(Focusing based on the age group an individual is in.)
- **How Often they Buy**
(The frequency of which they buy, travel or use your service or product.)
- **Annual Gross Household Income**
(This is looking at the sum total of the income coming into that family on an annual or monthly basis.)
- **Geography**
(The distance you need to travel or the time it will take to service that client from your office or home or the density of clients to be found in a certain area. It could also be a specific Geographic Area ... that is a certain income level of residents or value of their homes.)
- **Acceptability Level and / or Natural Fit**
(This is especially effective for a new sales person. It is the easiness or natural fit you may have with them because of things like; where you are in the present relationship with the Prospect or Client. It also could be connection through Race, Culture, Religion, Gender, Politics and even Social Styles.)
- **Cycle of Life**
(What Cycle of Life the person is in and the needs that Cycle creates. E.g. Young couples with two children ... need to think about putting money aside for the children’s education, elderly people who like group travel packages.)
- **Disposable Household Income**
(How much money they have left over after the necessities are paid.)
- **Family Conscious**
(How much someone cares about their family’s future and security. Someone who cares a lot will sacrifice to look after them and also buy the best. E.g. Safe vehicles, excellent tyres, educational policies, insurance etc.)
- **Profession, Occupation, Job Position**
(This is deciding that certain occupations, position and professions may be better clients than others.)
- **Hobby or Interests**
(Certain types of hobbies or interests can attract more of the type of Prospects or Clients you like to do business with.)
- **Influence / Status / Credibility**
(This is the value a Prospect or Client can add through their Influence or Network.)
- **Financially Responsible**
(Individuals who look after their money well and keep their financial commitments.)
- **Family / Personal Consumption Level**
(The amount a family or person may consume over a period of time. It could be fuel, food, beverages, household goods etc.)
- **Average Profit Per Purchase or Usage**
(On an average, how much profit per transaction with specific individuals or groups of individuals.)
- **Potential Future Business**
(This could be a graduating accountant or someone who will have to handle her own retirement funds in a year or someone who is advancing in his career. How long you have to wait to see the potential come to fruition would be a factor.)
- **Value of their Home**
(Specific individuals or groups that you would target based on the value of their homes. It could be Mortgage / Bond Companies, Swimming Pool Companies, Lawn Services etc.)
- **Net Asset Value**
(If someone has lots of assets, they may need risk cover on those assets or it may determine the amount available for investment or their ability to buy vehicles, boats other properties etc.).
- **Number of Products / Services They Could Buy**
(At certain points on the Cycles of Life individuals and families can buy a certain number of the products or services you offer. It could be the number of different products / services e.g. Bank Services or it could be the number of pairs of shoes they buy annually.)
- **Last Date of Purchase**
(Used more often with present clients and clients that haven’t been serviced. In the insurance business it could be Orphans which are people who are customers of the company but no one is servicing them. It could be fairly large ticket items like vehicles, fridges, stoves, washers, dryers, vacations. It can indicate that they should be contacted again at a specific time.)
- **Amount of Purchasing Power they have**
(It could be an individual who has control of funds and can make decisions on behalf of other people. Trustees at a Body Corporate, individual who administers the funds in a stokvel, a soccer team manager or the woman of the house.)

- **Ages of Their Children**
(Specifically targeting certain individuals that have children of certain ages.)
- **Experience or Product Knowledge**
(The level of advice needed by a potential client can be determined often by their present level of knowledge. Someone with minimal knowledge may need your services and be more receptive than someone who has lots of knowledge about your area of expertise and knowledge about specific products and services you offer. It could be an architect, and you are involved in design.)
- **Lump Sum**
(Individuals who receive large lump sums at one time, e.g. annual bonuses, at retirement, inheritance, sold a business, cashed in an investment etc.)
- **Personality Style**
(You may get along better with certain personality styles and because of that you do more business.)
- **Savings Conscious**
(People who like to save on gasoline, save on grocery bills, save money and are generally savings conscious.)
- **Situation or Circumstance**
(These are situations or circumstances in one's life that may make them more or less open for the services and products you offer. E.g. just had a baby, just got married, need ways to save on taxes, got a new promotion etc.)
- **Experience with Your Company**
(Whether or not they had a good or bad experience with your company and how long they've been a client etc.)
- **Mobility**
(How often they are mobile ... to what degree percentage wise. Someone who is in their vehicle 80% of their time may be a better cell phone customer than someone working in an office.)
- **Trading Area**
(An individual who communicates or trades mainly on a local level is a different kind of potential customer than someone who communicates and trades frequently on an International basis. E.g. Cell Phone Companies, Telephone Companies, Internet Services, Couriers would use this criteria.)
- **Image Conscious**
(People who are image conscious are different than those who are not. Clothiers, beauty salons, cosmetic companies, automobile manufacturers, jewellery stores etc. would find these criteria useful.)



Step 3: Breaking Criteria Into A, B, C Categories

Delete, combine and select criteria from the previous "Possible Criteria Worksheet" to finalise a maximum of 10 Criteria in order of importance. Break each criteria into ABC. Study the ABC examples in the ABC Criteria Examples on the next page. At the bottom of this page you could list additional ones without breaking them into ABC's. These are extra reminders when prospecting for Clients and Referral Sources.

ABC Criteria Worksheet

Segment: _____ Date: _____

Financial Adviser: _____ Office: _____

Criteria #1 A B C	
Criteria #2 A B C	
Criteria #3 A B C	
Criteria #4 A B C	
Criteria #5 A B C	
Criteria #6 A B C	
Criteria #7 A B C	
Criteria #8 A B C	
Criteria #9 A B C	
Criteria #10 A B C	

List a few other criteria if you think it is necessary. There is no need to break them down into ABC. These should be additional ones you think you should be aware of when prospecting or "farming" your present client list.

1. _____
2. _____
3. _____
4. _____
5. _____

ABC Criteria Examples – Selling To Individuals

- **Targeting Retail Customers Example (High End Clothiers)**
 1. **Image Important**
 - A - Very High
 - B - Somewhat
 - C - Very Little
 2. **Personality Style**
 - A - Expressive / Eccentric
 - B - High Action / Busy
 - C - Analytical / Supportive
- **Targeting Individual Cell Phone Users Example (Cell Phone Company Salesperson)**
 1. **Monthly Billings**
 - AAA - R3000+
 - AA - R2000 – R3000
 - A - R1000 – R2000
 - B - R500 – R1000
 - C - Under R500
 2. **Trading Area**
 - A - International / Area
 - B - Regional / Local
 - C - Local
 3. **Mobility**
 - A - 60% or more mobile
 - B - 20% - 59% mobile
 - C - Less than 20% mobile
- **Targeting Individual Prospects / Clients (Personal Financial Adviser / Banker)**
 1. **Annual Gross Household Income**
 - AAA - R400 000 +
 - AA - R300 000 – R400 000
 - A - R200 000 – R300 000
 - B - R120 000 – R200 000
 - C - Under R120 000
 2. **Acceptability and / or Natural Fit – Relationships/Race/Culture/Religion/Gender/Social Styles/Politics**
 - A - Easy to approach / Excellent Natural Fit
 - B - Somewhat easy to approach / Somewhat of a Fit
 - C - Awkward to approach / not a Good Fit
 3. **Disposable Household Income - Annually**
 - A - R30 000+
 - B - R10 000 – R30 000
 - C - Under R10 000
 4. **Family Conscious**
 - A - Very Family Conscious
 - B - Somewhat Family Conscious
 - C - Not Family Conscious
 5. **Financially Responsible**
 - A - Very
 - B - Somewhat
 - C - Not
 6. **Influence/Status/Credibility**
 - A - High
 - B - Medium
 - C - Low
 7. **Need For Advice Level**
 - A - High –Hot
 - B - Medium – Warm
 - C - Low - Cold

Step 4: Go To Page 58 Step 4 – ABC Segmentation

Work through the ABC Segmentation Worksheet. We've provided 3 sets of these sheets just in case you are focusing on three different segments.



Segment: Selling To “Businesses and Organisations”
Step 2: Brainstorming Possible Criteria

Once you’ve decided that this is one of your segment focuses then brainstorm a list of possible criteria you can think of that would help you identify which **Businesses and Organisations** you would prefer to focus on to do business with. We have included a list of Possible Criteria for **Selling to Businesses & Organisations** that starts on the next page. On the Possible Criteria Worksheet below, enter your Segment Focus, the date, your name and office location. Then do the following:

1. Brainstorm all the possible criteria for **Selling to Businesses and Organisations** that could help you focus / target more effectively. (Also draw from the Possible Criteria Examples).
2. By using the Priority Column prioritise the Criteria with #1 being the most valuable.
3. Then go to Step 3.

Possible Criteria Worksheet

Segment: _____ **Date:** _____

Sales Person / Executive: _____ **Office:** _____

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Possible Criteria - Selling To Businesses & Organisations

- **Company Sales Volume**
(Monthly or annual sales volume of the company. You may focus on certain sales volume companies.)
- **Net Asset Value**
(Banks, financial services, investment companies, and business brokers would utilise this criteria.)
- **Number of Staff**
(The number of staff that work for the company can indicate the potential of the business. Micro lending would use it, selling employee benefits, a union may use this for targeting as well as training and personnel companies.)
- **Size of Payroll**
(The actual volume paid out annually or monthly as wages, salaries, and bonuses. SETA's may use this criteria.)
- **Number of White Collar Workers**
(To some companies the number of white collar workers may be more important than the total number of workers. The average pay cheque is much higher with white collar workers.)
- **Location – Geographic**
(Where the business is located. It could be within a certain geographic radius, or a focus on Industrial Parks, Shopping Centres etc. It could also be the distance you are willing to travel to do business with specific businesses.)
- **Nature / Type of Business or Industry**
(Categorising based on the nature of the business and industry.)
- **Link to other Businesses / Roll-Out Possibilities**
(Businesses that are important to you because of the link they have with other sister businesses or the possibility of being able to roll out a program to other areas and businesses within a group.)
- **Number of Decision Makers**
(The more decision makers the longer it takes to get a decision and the higher cost of selling in time and energy. You may decide to target companies that a decision can be made fairly quickly. The transaction may be smaller but they may be easier to get so you sign a large number of them fairly quickly.)
- **Number of Our Products / Services They Could Use**
(Number of different services or products they could use or the number of specific (volume) products they could use in a specific period of time.)
- **Easiness of the Relationship**
(How "hassle free" it is to do business with them.)
- **Legal Entity**
(Whether or not it is a cc, partnership, private company, public company, parastatal etc.)
- **Union Influence**
(To what level the Union has influence in the business. A high level of influence by the Union could be a plus when you are selling specific services or products to the heavily Union influenced company and a challenge for selling other products to that company.)
- **Years in Business**
(The number of years they have been in business. You could be targeting new businesses or those who have been in business for 3 or more years.)
- **Black Empowerment / HDI Commitment**
(If the company is a Black Empowerment Company or Black Owned Business it could be easy to do business with them if you are a BE. It could also be difficult if you are not a BE as your HDI (Historically Disadvantaged Individuals) score is too low. This is a criteria that is necessary today in S.A.)
- **Credit Rating**
(How well they pay their bills.)
- **Amount in Rand Value they can Purchase Annually**
(The gross amount they can buy from you.)
- **Profitable Amount of Business they can Purchase**
(This is looking at the Profitable Business you can do with them.)
- **Life Cycle of the Business**
(At what point is the business at in the life cycle of a business? In KBI's 9 Stages of Business Growth and Decline we've identified the following stages:
 1. Concept Stage
 2. Take-off Stage
 3. Stable Stage
 4. Ambitious Stage
 5. Turbulent Stage
 6. Success Stage
 7. Mature Stage
 8. Establishment Stage
 9. Dormant Stage

*The stages are detailed in the Turning Entrepreneurial Spirit Into Business Opportunities Program.



- **Retain, Develop, Regain or Gain Relationship**
(The specific type of relationship you have with the client or prospect.)
- **Frequency or Steadiness of Buying**
(How often they buy and how consistently they buy.)
- **Amount of Advertising They Invest Annually**
(This often indicates how open and innovative they are. In the Advertising Industry it would definitely be a criteria.)
- **Number of Outlets**
(How many outlets a company may have.)
- **Credibility, Status, Pulse on the Industry**
(Profile of the business and also how in touch they are with their industry.)
- **Potential for Growth**
(The potential for growth in business that the client has.)
- **Amount of Direct Consumption**
(It could be in gallons, tons, electricity, food, beverage etc.)
- **Number of Executives Who Travel**
(The number of Executives who travel per month or year.)
- **Need Level**
(How much they need what you have. E.g. disaster clean-up service after a disaster, sales are at rock bottom and they need help, have to advertise to draw customers to their business, also could be urgency to buy.)
- **Timing**
(At what part of the buying cycle are they at.)
- **Employment Opportunity**
(Opportunity to employ a certain number of your people for a certain period of time. It could be a project that doesn't make money but it helps you retain some good people during a slow period.)
- **Trading Area**
(A company who communicates or trades mainly on a local level is a different kind of potential customer than someone who communicates and trades frequently on an International basis. E.g. Cell Phone Companies, Telephone Companies, Internet Services, Couriers etc.)
- **Knowledge Transfer Opportunity**
(Is it a project that you will learn some things you can transfer to other projects, new markets etc.)



Step 3: Breaking Criteria Into A, B, C Categories

Delete, combine and select criteria from the previous "Possible Criteria Worksheet" to finalise a maximum of 10 Criteria in order of importance. Break each criteria into ABC. Study the ABC examples in the ABC Criteria Examples on the next page. At the bottom of this page you could list additional ones without breaking them into ABC's. These are extra reminders when prospecting for Clients and Referral Sources.

ABC Criteria Worksheet

Segment: _____ Date: _____

Financial Adviser: _____ Office: _____

Criteria #1 A B C	
Criteria #2 A B C	
Criteria #3 A B C	
Criteria #4 A B C	
Criteria #5 A B C	
Criteria #6 A B C	
Criteria #7 A B C	
Criteria #8 A B C	
Criteria #9 A B C	
Criteria #10 A B C	

List a few other criteria if you think it is necessary. There is no need to break them down into ABC. These should be additional ones you think you should be aware of when prospecting or "farming" your present client list.

1. _____
2. _____
3. _____
4. _____
5. _____

ABC Criteria Examples – Selling To Businesses & Organisations

- **Targeting Local Businesses example (Radio Advertising Account Executive)**

1. **Possible Annual Radio Advertising Budget**

Market #1		Market #2		Market #3	
AAA	R300 K +	AAA	R200 K +	AAA	R100 K +
AA	R150K – R300K	AA	R100K – R200K	AA	R72K – R100K
A	R70K – R150K	A	R48K – R100K	A	R36K – R72K
B	R30K – R70K	B	R18K – R48K	B	R12K – R36K
C	Under R30K	C	Under R18K	C	Under R12K

2. **Promotion / Advertising Consciousness Rating**

- A - High Level 8 - 10
- B - Medium Level 4 - 7
- C - Low Level 3 or less

3. **Need / Want**

- A - Must or wants to advertise often
- B - Sometimes needs or wants to advertise
- C - Very little need or desire to advertise

4. **Financial Capability**

Financial Capability	Stability	Payment Schedule
A. Large Amount	No Risk	Pay within 30 days
B. Reasonable Amount	Some Risk	Pay within 30 –60 days
C. Small Amount	High Risk	Pay 60 to 90 days or longer

- **Targeting Businesses example (Personal Financial Planners / Bankers)**

1. **Employee Profile**

- A - 15 or more white – collar workers
- B - 8 – 14 white – collar workers
- C - Less than 8 white – collar workers

2. **Number of Employees**

Larger Market	Smaller Market
A - 100 - 500	A - 20 +
B - 50 -99 / 500 - 1000	B - 10 – 20
C - Less than 50 / 1000 or more	C - Less than 10

3. **Nature / Type of Business**

- A - High tech / Intellectual Capital (Consulting, Professional Services etc) / Manufacturing / Farming/ Wholesale
- B - Retail / Transport / Export / Distribution
- C - All Others

- **Targeting Corporations Example (Corporate Solutions Division – Cell Phones)**

1. **Level of Discounts Expected or Receiving**

- A - 0 – 2% discount
- B - 2 – 10% discount
- C - 11% or more discount

2. **Number of lines a client has the ability to buy**

- A - A1. 500 or more lines
A2. 200 to 499 lines
A3. 50 – 199 lines
- B - 15 – 49 lines
- C - Under 15 lines

3. **Size of their network or affiliate operations**

- A - Can influence 5 or more other organisations
- B - Can influence 3 or 4 other organisations
- C - Can influence 2 or less organisations

4. **Possible “Spend” per month**

- A - A1. R10 000 +
A2. R5 000 – R10 000
A3. R2 000 – R5 000
- B - R500 – R2 000
- C - Under R500

- **Targeting Industrial Plants etc. Example (Selling Industrial Services)**
- 1. **Profit**
 - A - 20% or more
 - B - 15 to 20%
 - C - 13 to 15%
- 2. **Outsourcing Keeness**
 - A - 25% or more inefficiency in ability to maintain certain technologies
 - B - 20 to 25% inefficiency in ability to maintain certain technologies
 - C - 15 to 25% inefficiency in ability to maintain certain technologies
- 3. **Size of Account (Volume per month)**
 - A - R10 000 +
 - B - R3 000 to R9 999
 - C - Under R3 000
- 4. **Matches our kind of offer "Competencies"**
 - A - Less than 20% Re-engineering to do the job
 - B - 20 – 40% Re-engineering to do the job
 - C - Above 40% has to be Re-engineered to do the job
- 5. **Repetitive – on Going process**
 - A - Stable – trouble free
 - B - Some trouble but fairly stable
 - C - Trouble and unstable or on and off

Step 4: Go to Page 58 Step 4 – ABC Segmentation

Work through the ABC Segmentation Worksheet. We've provided 3 sets of these sheets just in case you are focusing on three different segments.



Segment: Identifying Referral Sources
Step 2: Brainstorming Possible Criteria

Once you've decided that this is one of your segment focuses then brainstorm a list of possible criteria you can think of that would help you identify which **Referral Sources** you would prefer to focus on to do business with. We have included a list of Possible Criteria for **Identifying Referral Sources** that starts on the next page. On the Possible Criteria Worksheet below, enter your Segment Focus, the date, your name and office location. Then do the following:

1. Brainstorm all the possible criteria for **Identifying Referral Sources** that could help you focus / target more effectively. (Also draw from the Possible Criteria Examples).
2. By using the Priority Column prioritise the Criteria with #1 being the most valuable.
3. Then go to Step 3.

Possible Criteria Worksheet

Segment: _____ **Date:** _____
Sales Person / Executive: _____ **Office:** _____

1.	
2.	
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Possible Criteria: Identifying Referral Sources

What Is A Referral Source?

"A Referral Source is an individual that has the ability and network to supply you with a continual supply of Referrals for you to contact or be introduced to.

Identifying Your Right Referral Sources

In order to identify those Right Referral Sources, you need a number of criteria to help you recognise them. The writers of this program invested hundreds of hours working with executives, sales people and business owners from many industries on identifying and targeting good Referral Sources and they are sharing it with you.

Following are some of the criteria these people use to determine who they want to focus on as referral Sources:

- **Number of A & B Type Referrals per Annum**
(This is looking at the number of A & B Type Referrals per annum that the Referral Source could introduce you or "open the door" to them.)
- **Acceptability Level and / or Easy Fit with the Referral Source – Relationship / Race / Culture / Religion / Gender / Politics / Member of Same Club etc.**
(This is how easy it would be for you to ask for their assistance based on shared interests, situations, commonalities and at what level of relationship you are with them.)
- **Mutual Benefit Perception**
(How much he / she thinks it would be a benefit to him / her as well, e.g. Number of referrals of business you could send his / her way.)
- **Supplies to / and / or Specialises in Dealing with Our "A" and "B" Clients**
(This could be an auditor, a printer, an advertising rep, a doctor, a lawyer to name only a few. It will depend on the business you are in.)
- **Social Responsibility Towards Our Community and Helping People and Businesses**
(This could be a leader at a Place of Worship, a debt counsellor, an educator, a mayor, a banker, economic developer, other politicians.)
- **Experience as a Customer with you and / or Your Company**
(This is looking at how satisfied they were with their experience with you and / or your company as a Client. This would include someone who has had an experience with you in the past.)
- **Level of Pro-activity and / or Level of Motivation Need or Desire to Give Excellent Referrals**
(This could be an in-law or an associate that really wants you to succeed or someone you may be sharing some of your commission with or paying a "finders fee" for each new client they introduce to you. It is a good idea to put together a formal contract for remuneration with the better Referral Sources.)
- **By Profession or Job Position**
(This could be an auditor, a lender, lawyer, even a golf pro.)
- **An Individual Who Has Access to a Database that fits our "A" & "B" Type Prospect / Client Profile**
(This could be a Manager of a Chamber of Commerce, the Manager of the Architects Association or the Client Service Manager of a "High End" Automobile Dealership or the local Economic Developer.)
- **The Knowledge Level and Understanding of Our Industry and Products**
(This could be a present client, someone who worked in your Industry in the past or is an Executive in one of the Industry Associations.)
- **Potential for Growth as an "A" Referral Source**
(How soon they would be able to give you a reasonable number of Referrals.)
- **Geographical Location of the Referral Source**
(How easy it will be to keep contact and visit.)
- **Age Group he / she is In**
(Certain age group Referral Sources may be more compatible with you.)
- **Level of Credibility, Professionalism or Status that he / she has with his / her Network that fits your "A" and "B" Type Prospects / Clients**
(This is looking at how well respected they are within their network.)
- **Benefit Level to be Steering Business to Our Company and our Sales Reps**
(This could be a Supplier or someone wishing to do business with your company.)
- **Number of "A" and "B" Type Possible Leads Per Annum from Internal Divisions and Affiliates within Our Organisation**
(These could be property managers, procurement people, HR Manager, etc.)
- **Hobbies and Interests**
(The kind of Hobbies and Interests they may have.)



Step 3: Breaking Criteria Into A, B, C Categories

Delete, combine and select criteria from the previous "Possible Criteria Worksheet" to finalise a maximum of 10 Criteria in order of importance. Break each criteria into ABC. Study the ABC examples in the ABC Criteria Examples on the next page. At the bottom of this page you could list additional ones without breaking them into ABC's. These are extra reminders when prospecting for Clients and Referral Sources.

ABC Criteria Worksheet

Segment: _____ Date: _____

Financial Adviser: _____ Office: _____

Criteria #1 A B C	
Criteria #2 A B C	
Criteria #3 A B C	
Criteria #4 A B C	
Criteria #5 A B C	
Criteria #6 A B C	
Criteria #7 A B C	
Criteria #8 A B C	
Criteria #9 A B C	
Criteria #10 A B C	

List a few other criteria if you think it is necessary. There is no need to break them down into ABC. These should be additional ones you think you should be aware of when prospecting or "farming" your present client list.

1. _____
2. _____
3. _____
4. _____
5. _____

ABC Criteria Examples: Identifying Referral Sources

1. **Number of A & B Type Referrals per Annum**

Market #1	Market #2
A - 12 +	A - 8 +
B - 5 - 11	B - 3 - 7
C - 1 - 4	C - 1 - 3
2. **Acceptability Level and / or Easy Fit**
 - A - Easy Approach / Excellent Natural Fit
 - B - Somewhat Easy to Approach / Somewhat of a Fit
 - C - Awkward to Approach / Not a good Fit
3. **Mutual Benefit Perception**
 - A - Lots of Benefit
 - B - Some
 - C - Very Little
4. **Suppliers to and / or specialises in our "A" and "B" Type Prospects / Clients**
 - A - Most of the Time
 - B - Some of the Time
 - C - Very Seldom
5. **Social Responsibility Towards other People's Financial Welfare**
 - A - Big Social Responsibility
 - B - Some Social Responsibility
 - C - Very Little Social Responsibility
6. **Level of Credibility, Professionalism or Status that he/she has with his/her Network that fits our "A" and "B" Type Prospects / Clients**
 - A - High
 - B - Fair
 - C - Poor
7. **Experience as a Customer with you and / or your company**
 - A - Good to Excellent
 - B - Fair
 - C - Poor
8. **Level of Pro-Activity and / or Level of Motivation to Give Excellent Referrals**
 - A - High
 - B - Medium
 - C - Some
9. **By Profession / Job Position**
 - A - Auditors / Accountants / Successful Real Estate Sales People / Business Brokers / Principals / Professors / Doctors / Lawyers / Public Figures / HR Directors / Personnel Managers / Association Executives / Successful Business Consultants / Municipal Managers
 - B - Bankers / Teachers / Nurses/ Personal Trainers / Dance Instructors / Business Owners
 - C - All Others
10. **An Individual Who has Access to a Database that Fits our "A" and "B" type Prospect / Client Profile**
 - A - 100 + names
 - B - 30 - 99 names
 - C - 1 - 3 names
11. **Knowledge Level and Understanding of Our Industry and Products**
 - A - Good to Excellent
 - B - Fair
 - C - Poor
12. **Number of A & B Type Possible leads per annum for Internal Divisions or Affiliations of our Organisation**

Market #1	Market #2
A - 12 +	A - 8 +
B - 5 - 11	B - 3 - 7
C - 1 - 4	C - 1 - 3
13. **Potential for Growth as an "A" Referral Source**
 - Market #1
 - A - In less than 6 months
 - B - In 6 - 12 months
 - C - In 13 - 24 months

Step 4: Go to Page 58 Step 4 – ABC Segmentation

Work through the ABC Segmentation Worksheet. We've provided 3 sets of these sheets just in case you are focusing on three different segments.



Segment: Individual Influencers Within Organisations & Key Accounts
Step 2: Brainstorming Possible Criteria

Once you've decided that this is one of your segment focuses then brainstorm a list of possible criteria you can think of that would help you identify which **Individual Influencers within Organisations and Key Accounts** you would prefer to focus on to do business with. We have included a list of Possible Criteria for **Identifying Individual Influencers within Organisations & Key Accounts** that starts on the next page. On the Possible Criteria Worksheet below, enter your Segment Focus, the date, your name and office location. Then do the following:

1. Brainstorm all the possible criteria for **Identifying Individual Influencers within Organisations and Key Accounts** that could help you focus / target more effectively. (Also draw from the Possible Criteria Examples).
2. By using the Priority Column prioritise the Criteria with #1 being the most valuable.
3. Then go to Step 3.

Possible Criteria Worksheet

Segment: _____ **Date:** _____

Sales Person / Executive: _____ **Office:** _____

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Possible Criteria For Identifying Individual Influencers Within Organisations And Key Account Companies

- **Decision Maker:** (Is a main decision maker.)
- **Need the Person's Cooperation**
(This is someone who you will need on-side in order to make a sale, deliver the service or for it to work once they buy.)
- **Will be the Implementer**
(People who will be in charge to see that your product is used properly or your processes and services get implemented.)
- **Knows the "Lay of the Land"**
(An individual that really knows what is going on in the company. Who's Who! The Politics! The Agenda's! The Decision Makers! Who's In and Who's Out!
- **Respected by Others**
(Someone who is held in high regard by the key people in the organisation.)
- **Will be Affected by the Transaction**
(If the company buys what you are selling that person will be affected either negatively or positively.)
- **Works Close with the Decision Maker and Key People**
(This could be a "second in command" person, a personal assistant, top executive or department head etc.)
- **Assesses, Checks, Appraisers and Scrutinises**
(This person would have the job that measures and assesses and checks things on behalf of the company. Often known as the Protector. Could be a legal person, financial person, quality control, HR person, technical manager etc.)
- **Responsible for Managing Human Resources**
(They look at transactions closely to see how it may affect the people. Will there be jobs lost? What will the union say? What kind of training is needed? Does it collide with something else we are doing?)
- **Political Influence Power**
(The person is politically aligned with the right people and by saying a few words or giving their support can make things happen. It also could be a specific job position or title that gives them the political power like being in charge of the BEE Strategies.
- **Position of Power**
(M.D., Chairman, Board Member, General Manager, Chief Executive Officer (CEO), Chief Financial Officer (CFO), Union Head etc.)
- **Close to Decision Maker(s) Personally**
(It could be a friend, consultant, family member, a supplier or a person working close with the decision maker ... like a P.A. or someone on the board or part of a committee.)
- **Ability to Navigate Us**
(This is someone who can give direction and navigate you to the right people. Often called The Navigator.)
- **Sets Standards and Specific Actions**
(Could be a Procurement Manager, HR Director, an Engineer, an I.T. Manager Etc. This person sets the standards and specifications. If you can get to them early you can sometimes influence their decisions so your product or service can fit into their standards and specifications.)
- **Could Sabotage or Oppose**
(It is the people who may be in opposition or if they wanted to they could sabotage your project or relationship. You need to get close to them. Stay close to your friends but get even closer to your enemies.)
- **Has Valuable Technical or Operational Information**
(These are people that you need on-side because of the information, knowledge and experience they have.)
- **Influence Over a Large Number of People**
(Could be an executive, a person who is a head of a social club or business association or a person who has access to the media or the internal communication channels or a Union leader.)
- **Advises or Consults the Key People**
(It could be an outside consultant, and internal trusted adviser or just a well respected business associate or family member.)
- **Likes us and is Happy with our Service**
(Anyone who really likes us and wants to see us do well in reference to doing business with the company. It can also be a person who is "knocked out" with our service and is willing to support us.)
- **Can Affect the Volume of Business or How Much of a Budget We Can Earn**
(Someone who can say yes ... when others say no ... and it will still go through or someone who says no, when everyone says "yes" and it will not go forward. It definitely is someone in control of a lot of decisions and / or someone who controls the budgets.)
- **Manages the Flow or Process**
(A person in charge of a process or work flow that you need their cooperation for your solutions to work.)



Step 3: Breaking Criteria Into A, B, C Categories

Delete, combine and select criteria from the previous "Possible Criteria Worksheet" to finalise a maximum of 10 Criteria in order of importance. Break each criteria into ABC. Study the ABC examples in the ABC Criteria Examples on the next page. At the bottom of this page you could list additional ones without breaking them into ABC's. These are extra reminders when prospecting for Clients and Referral Sources.

ABC Criteria Worksheet

Segment: _____ Date: _____

Financial Adviser: _____ Office: _____

Criteria #1 A B C	
Criteria #2 A B C	
Criteria #3 A B C	
Criteria #4 A B C	
Criteria #5 A B C	
Criteria #6 A B C	
Criteria #7 A B C	
Criteria #8 A B C	
Criteria #9 A B C	
Criteria #10 A B C	

List a few other criteria if you think it is necessary. There is no need to break them down into ABC. These should be additional ones you think you should be aware of when prospecting or "farming" your present client list.

1. _____
2. _____
3. _____
4. _____
5. _____

ABC Criteria Examples: Identifying Individual Influencers Within Organisations and Key Account Companies

1. **Can Influence the Amount Of Business / Budget We Can Receive**
 - A - Large amount
 - B - Some amount
 - C - Very little
2. **Decision Making Position / Power**
 - A - Main decision maker
Part of the decision making team / committee
Major influencer in the decision
 - B - Some influence in the decision
 - C - Very little influence
3. **Works With / Personally Close To Major Decision Makers**
 - A -
 - 1) Handles most of or is part of most transactions
 - 2) Co-ordinates most of the decision maker's schedule / activity
 - 3) Has input on most decisions
 - 4) Very close personally – Family / Friend / Associate
 - B -
 - 1) Handles some of or is part of some transactions
 - 2) Co-ordinates a part of the decision maker's schedule / activity
 - 3) Just knows the decision makers
 - C - Small amount or no involvement with the decision maker
4. **Navigator's Ability**
 - A -
 - 1) Well respected internally
 - 2) Knows the decision making process
 - 3) Understands the corporate process
 - 4) Up to date on the corporate politics
 - 5) Is aware of personal agendas of key influencers
 - 6) Is privy to the corporate and project goals and objectives
 - B -
 - 1) Some respect internally
 - 2) Has 3 of the 5 points from 2 to 6 in the A column
 - C -
 - 1) Has not got respect internally
 - 2) Very little or none of point 2 to 6 going for him / her
5. **Can Cause a 'No' or "Terminate a Contract"**
 - A - Plays major role in
 - 1) Setting the specs for a bid
 - 2) Assessing, checking, appraising or scrutinising
 - B - Some influence or part of a group who are involved in
 - 1) Setting the specs for a bid
 - 2) Assessing, checking, appraising or scrutinising
 - C - Very little ability to cause a "no" or "terminate a contract"
6. **Implements or Works With, or Manages Our Products, Processes, Services or Team On An Ongoing Basis**
 - A -
 - 1) Close working relationship needed most of the time
 - 2) Main user of implementer or manger of...
 - B -
 - 1) Close working relationship needed some of the time
 - 2) Periodic user or implementer or manager of...
 - C -
 - 1) Close working relationship hardly ever needed
 - 2) Hardly ever implements, uses or is manger of...
7. **Motivation Level To Sabotage Or Oppose**
 - A - Big reason / many motivations to sabotage or oppose
 - B - Some reason / small amount of motivations to sabotage or oppose
 - C - Very little or no reason to sabotage or oppose
8. **Value Of Technical / Operation Experience And Information**
 - A - Need their technical / operation experience and information
 - B - Need some of their technical / operation experience and information
 - C - Need very little or none
9. **Need Or Want Level For Our Solutions / Products**
 - A - Really needs / wants what we offer
 - B - Some need / want for what we offer
 - C - Very little or no need / want for what we offer

Step 4: Go to Page 58 Step 4 – ABC Segmentation

Work through the ABC Segmentation Worksheet. We've provided 3 sets of these sheets just in case you are focusing on three different segments.



Segment: Channels Of Distribution

Step 2: Brainstorming Possible Criteria

Once you've decided that this is one of your segment focuses then brainstorm a list of possible criteria you can think of that would help you identify which **Organisations that are Channels of Distribution as Retailers, Resellers, Distributors, Wholesalers, Brokerage Firms and Service Outlets** you would prefer to focus on to do business with. We have included a list of Possible Criteria for **Channels of Distribution** that starts on the next page. On the Possible Criteria Worksheet below, enter your Segment Focus, the date, your name and office location. Then do the following:

1. Brainstorm all the possible criteria for **Channels of Distribution** that could help you focus / target more effectively. (Also draw from the Possible Criteria Examples).
2. By using the Priority Column prioritise the Criteria with #1 being the most valuable.
3. Then go to Step 3.

Possible Criteria Worksheet

Segment: _____ Date: _____
 Sales Person / Executive: _____ Office: _____

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Possible Criteria: Companies, Organisations and Institutions that are Channels of Distribution as Retailers, Resellers, Distributors, Wholesalers, Brokerage Firms and Service Outlets

- **Amount of Income Annually**
(The amount of possible income annually that could come from the channel of Distribution)
- **Quality of The Business**
(It could be "claims ratio" in short term insurance or "credit risk" in retail or "returns" in retail)
- **Business Ethics**
(Level of business ethics The Company or founder is known for)
- **Growth Potential**
(Potential for growth.)
- **Match our Products or Service**
(To what degree do their customers match what we sell or market)
- **Success Level / Success Image**
(Are they good to be affiliated with in reference to image and credibility)
- **Loyalty**
(Do they skip from supplier to supplier and only focus on price, rates, and incentives or are they loyal to their suppliers.)
- **Knowledge, Experience, Know How**
(To what level they add value to our products and services are qualified to re-sell, distribute or service the end user.)
- **Geographic Area**
(How close are they to our main target market "end user". What is the population density level in reference to the customers we need to reach)
- **Monthly or Annual Turnover**
(You could categories by the amount of turnover (Sales) they do monthly or annually.)
- **Terms of the Transaction With The End User**
(In the financing of the resellers "credit books" ...how much is 24 months, 12 months, 6 months.)
- **Frequency of Deals**
(How often they give you business)
- **Number of Individual Sales People, Agents, Brokers, Representation**
(How many people do they have that sell on the Distribution Channels behalf.)
- **Maintenance (effort) Versus Income**
(How much work do you have to put in to receive the business. Some companies and individuals are high maintenance and some are not.)
- **Loyalty of Their Customers**
(Are their clients steady repeat customers or inconsistent.)
- **Type of Merchant / Broker / Agency / Wholesaler**
(What is their focus)
- **Price Range of Their Services or Products**
(The price range that they sell in, needs to fit your product or service.)
- **Advertising Spend**
(Do they aggressively promote their business and products or are they passive and cautious in advertising and promotion.)
- **After Sales Service**
(What is their level of service with their customers.)
- **Stock Level**
(Do they carry good stock levels and offer a good variety.)



Step 3: Breaking Criteria Into A, B, C Categories

Delete, combine and select criteria from the previous "Possible Criteria Worksheet" to finalise a maximum of 10 Criteria in order of importance. Break each criteria into ABC. Study the ABC examples in the ABC Criteria Examples on the next page. At the bottom of this page you could list additional ones without breaking them into ABC's. These are extra reminders when prospecting for Clients and Referral Sources.

ABC Criteria Worksheet

Segment: _____ Date: _____

Financial Adviser: _____ Office: _____

Criteria #1 A B C	
Criteria #2 A B C	
Criteria #3 A B C	
Criteria #4 A B C	
Criteria #5 A B C	
Criteria #6 A B C	
Criteria #7 A B C	
Criteria #8 A B C	
Criteria #9 A B C	
Criteria #10 A B C	

List a few other criteria if you think it is necessary. There is no need to break them down into ABC. These should be additional ones you think you should be aware of when prospecting or "farming" your present client list.

1. _____
2. _____
3. _____
4. _____
5. _____

ABC Criteria Examples: Companies, Organisations and Institutions that are channels of Distribution as Retailers, Resellers, Distributors, Wholesalers, Brokerage Firms and Service Outlets.

- **Identifying Brokerage Firms – Short Term Insurance (These firms would be called on by Broker Consultants**

1. Amount of Premium Income Annually

- A - 3 Million +
- B - 1 Million – 3 Million
- C - Under 1 Million

2. Claims Ratio

- A - A1. 30% and less A2. 31 -45% A3. 46 –60%
- B - 61 –6 5%
- C - 66% or more

3. Business Ethics

- A - Rating 8 - 10
- B - Rating 6 - 7
- C - 5 or less

4. Growth Potential

- A - Major growth in the next year
- B - Major growth in year 2
- C - Major growth in year 3 or later

5. Match our Products and / or Focus

- A - 60% or more we can fill
- B - 35 – 59%
- C - Under 35%

6. Success level / Success image as a Brokerage Firm

- A - Rating 8 - 10
- B - Rating 5 - 7
- C - Rating under 5

7. Loyalty to suppliers

- A - Rating 8 - 10
- B - Rating 5 - 7
- C - Rating under 5

8. Knowledge / Experience / know how

- A - Rating 8 - 10
- B - Rating 5 - 7
- C - Rating under 5

- **Targeting Merchants by a Financial Services Company or Bank who Finances Transactions for the Merchant's Customers**

1. Market Profile

- A - Good Fit
- B - Some Fit
- C - No Fit

2. Feet through the door

- A - Lots of feet through door
- B - Some feet through door
- C - Few feet through door

3. Location

- A - Close to taxi rank / station / township
- B - Close to CBD
- C - Industrial / outlying

4. Geographic - Distance

- A - Within 1 km
- B - 1 – 5 km from branch
- C - Beyond 10km from branch

5. Frequency of Deals

- A - Every Month
- B - Every 2nd Month
- C - Now and then

6. Number of Deals per month

- A - 10 + per Month
- B - 1 –9 Month
- C - Intermittent / now & then

7. **Quality of Business**
 - A - Low % defaults
 - B - Fair % defaults
 - C - High % defaults
- **A Supplier to OEM's (Original Equipment Manufacturers), SI's (Systems Integrators), SEM's (Switchboard Manufacturers). (All of these companies would use the suppliers material in equipments and systems to create something that is sold to another company or project. It could also be Project Houses.**
 1. **Strategic Influence – Industry / Additional Business / Status etc.**
 - A - Major influence
 - B - Some influence
 - C - Very little influence
 2. **Large projects Planned**
 - A - Starting within 6 months
 - B - Starting within 6 to 18 months
 - C - Starting after 18 months
 3. **Present Business Projects**
 - A - Very Busy – Lots of projects
 - B - Steady – Some projects
 - C - Slow – Only a few projects
 4. **Stage of Project Being Handled**
 - A - Invisible Development Stage/Visible Development/Maximum Development
 - B - Initiation Stage / Visible Decline Stage
 - C - Rejuvenation stage

Step 4: Go to Page 58 Step 4 – ABC Segmentation

Work through the ABC Segmentation Worksheet. We've provided 3 sets of these sheets just in case you are focusing on three different segments.



Segment: Identifying Salespeople, Brokers, Agents and other key people that sell directly to or service the “end buyer” or “end user” on behalf of the channels of Distribution Companies and Organisations.

Step 2: Brainstorming Possible Criteria

Once you've decided that this is one of your segment focuses then brainstorm a list of possible criteria you can think of that would help you identify which **Salespeople, Brokers, Agents and other Key People that sell directly to or service the ‘E nd Buyer’ or ‘E nd User’ on behalf of the Channels of Distribution Companies and Organisations** you would prefer to focus on to do business with. We have included a list of Possible Criteria for **Salespeople Who Sell Directly** that starts on the next page. On the Possible Criteria Worksheet below, enter your Segment Focus, the date, your name and office location. Then do the following:

1. Brainstorm all the possible criteria for **Salespeople Who Sell Directly** that could help you focus / target more effectively. (Also draw from the Possible Criteria Examples).
2. By using the Priority Column prioritise the Criteria with #1 being the most valuable.
3. Then go to Step 3.

Possible Criteria Worksheet

Segment: _____ **Date:** _____

Sales Person / Executive: _____ **Office:** _____

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Possible Criteria: Identifying Salespeople, Brokers, Agents and other key people that sell directly to or service the “end buyer” or “end user” on behalf of the channels of Distribution Companies and Organisations.

- **Amount of Business They Personally Write**
(How much volume of business the individual sells or influences with the “end user” / The Customer).
- **Passion for Money / Incentives / Recognition Drive**
(How enthusiastic or passionate is the individual.)
- **Literate and Skilled**
(To what level is the person literate and skilled around our products and service).
- **Business Focused**
(How focused is he or she on business in comparison to other things in his or her life).
- **Sales Ability**
(What is the level of their sales ability?).
- **Fit Profile – Social Demographics**
(Do they fit the profile – social demographics of who we believe can really market our products and services?).
- **Quality of The Business**
(The quality of business that individual writes).
- **Business Ethics**
(Level of business ethics the individual has).
- **Growth Potential**
(Potential for growth with his/her individual sales).
- **Match our Products or Service**
(To what degree does that person’s customers match what we sell or market).
- **Success Level / Success Image**
(Is the person a leader in their Company).
- **Loyalty**
(Is the person loyal or does he/she skip from supplier to supplier and only focus on price, rates and incentives).
- **Knowledge, Experience, Know How**
(To what level does he or she add value to our products and service or is qualified to re-sell, distribute or service the end user).
- **Geographic Area**
(How close is he or she to our main target market “end user”. What is the population density level in reference to the customers we need to reach).
- **Monthly or Annual Turnover**
(The actual turnover of sales they do monthly or annually. Not necessarily your product or service).
- **Frequency of Deals**
(How often he or she gives you business).
- **Maintenance (effort) Versus Income**
(How much work do you have to put in to receive the business? Some individuals are high maintenance and some are not).
- **Loyalty of Their Customers**
(Are their clients steady repeat customers or inconsistent.)
- **The Focus The Person Has**
(What is their focus...Is it on family owned businesses, is it selling specific vehicles etc.)
- **Price Range of Their Services or Products**
(The price range that they sell in needs to fit your product or service.)
- **After Sales Service**
(What is their level of service with their customers?)



Step 3: Breaking Criteria Into A, B, C Categories

Delete, combine and select criteria from the previous "Possible Criteria Worksheet" to finalise a maximum of 10 Criteria in order of importance. Break each criteria into ABC. Study the ABC examples in the ABC Criteria Examples on the next page. At the bottom of this page you could list additional ones without breaking them into ABC's. These are extra reminders when prospecting for Clients and Referral Sources.

ABC Criteria Worksheet

Segment: _____ Date: _____

Financial Adviser: _____ Office: _____

Criteria #1 A B C	
Criteria #2 A B C	
Criteria #3 A B C	
Criteria #4 A B C	
Criteria #5 A B C	
Criteria #6 A B C	
Criteria #7 A B C	
Criteria #8 A B C	
Criteria #9 A B C	
Criteria #10 A B C	

List a few other criteria if you think it is necessary. There is no need to break them down into ABC. These should be additional ones you think you should be aware of when prospecting or "farming" your present client list.

1. _____
2. _____
3. _____
4. _____
5. _____

ABC Criteria Examples: Identifying Salespeople, Brokers, Agents and other key people that sell directly to or service the “end buyer” or “end user” on behalf of the channels of Distribution Companies and Organisations.

- **Individual Brokers in a Short Term Insurance Brokerage Firm that Need to be Individually Targeted by a Broker Consultant from the Short Term Insurance Company.**
- 1. **Individual Broker – Annual Premium Income**
 - A - Write R500 000 or more
 - B - Writes R200 000 – R500 000
 - C - Writes under R200 000
- 2. **Claims Ratio**
 - A - 60% or less
 - B - 61 –6 5%
 - C - 66% or more
- 3. **Business Ethics**
 - A - Rating 8 - 10
 - B - Rating 6 - 7
 - C - 5 or less
- 4. **Growth Potential**
 - A - Major growth in the next year
 - B - Major growth in year 2
 - C - Major growth in year 3 or later
- **Targeted by a Representative from a Bank that Finances purchases by customers**
- 1. **Passionate for Money / Incentive / Recognition Driven**
 - A - Yes
 - B - Maybe
 - C - No
- 2. **Knowledge of Product / Industry / Service**
 - A - High
 - B - Medium
 - C - Low
- 3. **Literate and Skilled**
 - A - Fully
 - B - Fairly
 - C - Basic
- 4. **Business Focused**
 - A - Always
 - B - Most of the time
 - C - Sometimes
- 5. **Level of Sales Ability**
 - A - High
 - B - Medium
 - C - Low
- 6. **Pro-Active Influencer**
 - A - High
 - B - Medium
 - C - Low
- 7. **Fit Profile Social Demographic**
 - A - Perfect
 - B - Some Fit
 - C - No Fit
- 8. **Ethics**
 - A - Highly Ethical
 - B - Some Ethics
 - C - None

Step 4: Go to Page 58 Step 4 – ABC Segmentation

Work through the ABC Segmentation Worksheet. We've provided 3 sets of these sheets just in case you are focusing on three different segments.



Segment: Large Projects, Events and Functions

Step 2: Brainstorming Possible Criteria

Once you've decided that this is one of your segment focuses then brainstorm a list of possible criteria you can think of that would help you identify which **Large Projects, Events and Functions** you would prefer to focus on to do business with. We have included a list of Possible Criteria for **identifying Large Projects, Events and Functions** that starts on the next page. On the Possible Criteria Worksheet below, enter your Segment Focus, the date, your name and office location. Then do the following:

1. Brainstorm all the possible criteria for **Large Projects, Events and Functions** that could help you focus / target more effectively. (Also draw from the Possible Criteria Examples).
2. By using the Priority Column prioritise the Criteria with #1 being the most valuable.
3. Then go to Step 3.

Possible Criteria Worksheet

Segment: _____ Date: _____
 Sales Person / Executive: _____ Office: _____

1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	
9.	
10.	
11.	
12.	
13.	
14.	
15.	
16.	
17.	
18.	

Possible Criteria: Focusing On Large Projects, Function and Events.

- **Profit**
(What will be the profit level in being a contractor or supplier to The Project, Function or Event).
- **Possible Portion of The Volume of Business**
(How much can we possibly receive from the project in volume of income not necessary profit).
- **States / Reference Project**
(Is it a project that can give us special recognition and be of help to us to land other business)?
- **Fits Goals / Visions / Expertise**
(Does the project align with who we are and where we are going. To what degree?).
- **Employment Opportunities**
(How many of our people will it employ and for how long. Sometimes you take projects to retain good people during a slow period).
- **Knowledge Transfer**
(What new skills could we learn to transfer to future projects).
- **Retain/Develop/Regain/Gain a Relationship**
(You may take on a project just to regain a relationship that needs fixing, or to gain a new relationship or build a relationship. It may not be immediately financially responsible but it could be over a longer period of time in reference to the relationship).
- **Business Continuity – Roll-out Opportunities**
(We may choose to take a project or participate in it because of the opportunities to “Roll it out” in other areas or within an industry etc).
- **Publicity**
(It may be a project or event that isn't all that profitable but you receive excellent publicity that is worth a lot financially).
- **Contacts**
(Some Projects, Functions and Events provide you with great opportunities to meet valuable contacts).
- **New Markets / New Opportunities**
(Sometimes you take on a project or function because it opens up new products or services for you to sell to present markets and new markets).
- **Partnerships and Strategic Alliances**
(Some projects are worthwhile because of the new partnerships or strategic alliances you get involved in which can strengthen our future possibilities for business).

Note: Several of the above criteria would support getting involved with the World Cup Soccer 2010 Event in South Africa.

It could be profitable but even if it doesn't show big profits it could be valuable because:

- It will be a Status / Reference Project
- It could provide several years employment
- There could be Knowledge Transfer
- Publicity
- Lots of contacts
- New markets and new opportunities

The Business Success Series being developed in conjunction with Ntsika Enterprise Promotion Agency meets several of these criteria for Knowledge Brokers and Bill Gibson the author.



Step 3: Breaking Criteria Into A, B, C Categories

Delete, combine and select criteria from the previous "Possible Criteria Worksheet" to finalise a maximum of 10 Criteria in order of importance. Break each criteria into ABC. Study the ABC examples in the ABC Criteria Examples on the next page. At the bottom of this page you could list additional ones without breaking them into ABC's. These are extra reminders when prospecting for Clients and Referral Sources.

ABC Criteria Worksheet

Segment: _____ Date: _____

Financial Adviser: _____ Office: _____

Criteria #1 A B C	
Criteria #2 A B C	
Criteria #3 A B C	
Criteria #4 A B C	
Criteria #5 A B C	
Criteria #6 A B C	
Criteria #7 A B C	
Criteria #8 A B C	
Criteria #9 A B C	
Criteria #10 A B C	

List a few other criteria if you think it is necessary. There is no need to break them down into ABC. These should be additional ones you think you should be aware of when prospecting or "farming" your present client list.

1. _____
2. _____
3. _____
4. _____
5. _____

ABC Criteria Examples: Large Projects, Events and Functions

1. **Profit**
 - A - 15% or more
 - B - 13 – 15%
 - C - Under 13%
2. **Status / Reference Project**
 - A - It will be Unique / Well Executed / State of the Art / Customer will be Enthusiastic
 - B - It will be quite Well Executed / Customer will be Pleased
 - C - Nothing Special
3. **Fits Goals / Visions / Expertise**
 - A - Well Aligned
 - B - Reasonably
 - C - Not Aligned Well
4. **Employment Opportunity**
 - A - Major employment over certain period of time
 - B - Some employment in same period
 - C - Small amount of employment
5. **Knowledge Transfer**
 - A - Lots
 - B - Some
 - C - Very Little
6. **Retain / Develop / Regain / Gain a Relationship**
 - A - Much needed to repair, keep or develop or gain a relationship
 - B - Much needed to repair, keep or develop or gain a relationship
 - C - Much needed to repair, keep or develop or gain a relationship
7. **Business Continuity – Roll – out opportunity**
 - A - Lots of opportunity for roll-out
 - B - Some opportunity for roll-out
 - C - Very little opportunity for roll-out

Step 4 – ABC Segmentation

Once you've gotten your 8 – 10 Criteria in place and broken into ABC Categories for this segment, you then take the ABC Segmentation Worksheet on the next page and do the following:

1. Enter the following information: Segment Focus, Your Name, Office and Date.
2. Enter your top 8 Criteria as a reminder on the top of the ABC Segmentation Worksheet.
3. Take your present Client or Customer list and segment them into A's, B's or C's under the Retain and Develop Columns.
4. Take your present Prospects and segment them into A's, B's or C's under the Regain or Gain Columns.

Note: If you are a retailer or someone with several 100 or several thousand clients you may only decide to take the top 50, top 100 or top 300 and do this exercise.

As a retailer you may decide to focus only on 50 to 100 top referral sources and influencers who can mobilize a large number of people to do business with you.

Note: Don't get analysis paralysis. You do not have to be exact. Use the criteria as a guideline but at the same time use your intuition.

The objective is to get your Clients and Prospects in a format so you can easily decide where to best focus your time, energy, ability, money and reputation. You don't need several criteria to justify someone being an A Client or Prospect. One criteria that says they are an "A" can justify them being an A Category Client. Make quick decisions. You can always change it later when you have more details on a company, project or individual.

A common question in reference to this method is:

Question: I don't know the person's exact income or disposable income.

Answer: You don't need to know. Take a guess based on the person's profession, where she lives, how long she has been in the profession, approximate age etc. Look for other clients and associates that you have those details on and base your guess on that information.

Remember, this is not a long, drawn out research project. It is only there to help you focus better most of the time ... as a pro-active salesperson and marketer.

It Is A Way Of Life

This process will initially take an investment of time and energy and it will be worth it. On an ongoing basis the circumstances and results with clients and prospects will change. Make the list something you work with at least on a weekly basis. It is a great tool for planning and implementing.

In module 3 – Making Data Base Selling Pay we will give you a series of actions and strategies so that you can really tune this planning and management process into excellent financial and relationships building "Results". This is still the planning stage ... getting ready for the opportunities!

Boosting Sales & Profits With Focus Selling



Page ____ of ____

ABC Segmentation Worksheet

Segment: _____ Sales Person: _____ Office: _____

Criteria #1: _____ Criteria #3: _____ Criteria #5: _____ Criteria #7: _____

- A: _____ A: _____ A: _____ A: _____
- B: _____ B: _____ B: _____ B: _____
- C: _____ C: _____ C: _____ C: _____
- Criteria #2: _____ Criteria #4: _____ Criteria #6: _____ Criteria #8: _____
- A: _____ A: _____ A: _____ A: _____
- B: _____ B: _____ B: _____ B: _____
- C: _____ C: _____ C: _____ C: _____

Category: ABC AAA, AA, A, etc.	Present Users / Relationships		Past Users / Relationships		Potential Users / Relationships	
	Retain Strategy	Develop Strategy	Regain Strategy	Gain Strategy		



ABC Segmentation Worksheet - Continued

Category: ABC AAA, AA, A, etc.	Present Users / Relationships		Past Users / Relationships	Potential Users / Relationships
	Retain Strategy	Develop Strategy		



ABC Segmentation Worksheet

Segment: _____ Sales Person: _____ Office: _____ Date: _____

Criteria #1: _____ Criteria #3: _____ Criteria #5: _____ Criteria #7: _____

A: _____ A: _____ A: _____ A: _____

B: _____ B: _____ B: _____ B: _____

C: _____ C: _____ C: _____ C: _____

Criteria #2: _____ Criteria #4: _____ Criteria #6: _____ Criteria #8: _____

A: _____ A: _____ A: _____ A: _____

B: _____ B: _____ B: _____ B: _____

C: _____ C: _____ C: _____ C: _____

Category: ABC AAA, AA, A, etc.	Present Users / Relationships		Past Users / Relationships	Potential Users / Relationships
	Retain Strategy	Develop Strategy	Regain Strategy	Gain Strategy



ABC Segmentation Worksheet - Continued

Category: ABC AAA, AA, A, etc.	Present Users / Relationships		Past Users / Relationships	Potential Users / Relationships
	Retain Strategy	Develop Strategy		



ABC Segmentation Worksheet

Segment: _____ Sales Person: _____ Office: _____ Date: _____

Criteria #1: _____ Criteria #3: _____ Criteria #5: _____ Criteria #7: _____

A: _____ A: _____

B: _____ B: _____

C: _____ C: _____

Criteria #2: _____ Criteria #4: _____ Criteria #6: _____ Criteria #8: _____

A: _____ A: _____

B: _____ B: _____

C: _____ C: _____

Category: ABC AAA, AA, A, etc.	Present Users / Relationships		Past Users / Relationships	Potential Users / Relationships
	Retain Strategy	Develop Strategy	Regain Strategy	Gain Strategy



ABC Segmentation Worksheet - Continued

Category: ABC AAA, AA, A, etc.	Present Users / Relationships		Past Users / Relationships	Potential Users / Relationships
	Retain Strategy	Develop Strategy		

Identifying Your Target Prospect Markets

Introduction

- Gideon du Plessis, probably the top earning Financial Adviser in South Africa, puts a lot of effort into the Independent Business Owner and Entrepreneur Market. He likes doing business with these people because they usually have a big need for financial advice, have got the money to invest and buy needed products, plus they can make a decision quickly if they like what they see. They are also direct, don't like to waste time and they are much like Gideon who in essence runs his own very successful independent business just like them. There is an Excellent Fit.
- A large portion of Knowledge Brokers International's income is earned from the Banking Industry and the Financial Services Industry in South Africa. We have become specialists in that very lucrative market. These are two target markets that are busy becoming even more professional and efficient in selling. They are also large enough to purchase our systems and processes plus they always pay their bills.
- Madelyn Coburn, one of the top salespeople for BMW South Africa focuses on the Jewish Community as one of her target markets. She frequents the establishments that the Jewish Business community frequents. She truly understands that market and does a massive amount of business with these people.
- The China Moon restaurant in Sandton works very closely with the Chinese Embassy and frequently handles tours of people in their restaurant, from the Far East.
- A furniture store in Bloemfontein is located close to a large township. They cater mainly to that market.
- The Hyatt Hotel in Rosebank has been able to attract and cater to the affluent and upwardly mobile Black Businesspeople Market.
- Khonzeka Magxekeza, design artist of African Textile Painting has targeted the "tourism market" in South Africa, Brussels, Germany and Atlanta, U.S.A.

These are all examples of Target Markets that Entrepreneurs and salespeople decided to focus on.

Even though they focused on these specific Target Markets, they still had to use another criteria to narrow down which Prospects and Clients in those Target Markets are more valuable to them. On selling to individuals, they would definitely have a look at Age, Income Level, Influence Level, Status, Credibility, Financial Responsibility, Cycle of Life, Disposable Income, Family Consciousness to name a few. In selling to businesses they would've used Volume of Business, Payment Ability, Size of the Business, Geographic Location and a number of other criteria. In this section, we will assist you in defining the target markets that may be the most profitable and logical for you to focus on.

If you become knowledgeable of specific Target Markets and become a credible expert in assisting the Prospects and Clients who are part of those markets, it is often much easier to build and sustain your business than moving in and out of dozens of different markets. There is a saying .."Do you want to be a Jack of All Trades and a Master of None?" I think most of us would rather be focussed and a master of one or two trades

What Is A Target Prospect Market?

According to the writers, a Targeted prospect Market is "A specific group of people and / or entities that you would find it advantageous to focus on. This group would be held together for reasons such as shared interests, affiliation, physical location, membership, common activities and characteristics, tradition, culture, specific needs, wants and desires, and similar situations and circumstances."

What Are The Advantages Of Working Target Prospect Markets?

We are outlining a few of the many advantages of working in a Target Prospect Market for you to review:

- **Develop Specific Expertise:**
By concentrating on a specific Prospect Market, it is easier to build up that personal asset called "Ability". You can become an expert much quicker because you are consistently exposed to their common needs and solutions. In turn it is much easier to find many of the right people to invest that personal asset with because you are constantly where they are at. The Prospects and Clients in that Market appreciate it because they are receiving specialised knowledge from an individual who has shown real interest by learning about their needs, their industry, and their specific solutions.
- **Develop Rapport:**
Rapport building is easier. People like to do business with people that are also much like them. You pick up the language of the industry, what is going on in the industry or Market and it becomes easier to adapt and become in synchronicity with the people in that Market, group or industry.
- **Enhance Your Reputation:**
It is easier to get a better return on investment on your Reputation. It is easier to build a strong positive reputation in a specific Market or Group. The people in these Markets associate with each other and positive "word-of-mouth" travels fast.

- **Easier Referrals:**
Referrals are easier to get because of the excellent job you do and it is easier to develop more meaningful trusting relationships. There are 5 Stages to Relationship Development. Stage 1 is the Attraction Stage, Stage 2 is the Exploration Stage, Stage 3 is the Development Stage, Stage 4 is the Commitment Stage and Stage 5 is the Unity Stage. It is at the Commitment and Unity Stage where the real meaningful referrals come from and working Target Markets makes it easier to get to the last two stages.
- **Repeat Business**
Repeat Business – when you are concentrated on a specific Market you are naturally going to be in front of the clients more often ... that makes for more repeat business and less loss of clients and more opportunities to Develop and Retain Clients.
- **Accurate Projections:**
It is easier to project the amount of business you can expect because you get to know when they are most likely to buy, the size of the orders, and individuals and who you need to talk to in order to access this information. It helps you set more accurate financial targets, project your costs of doing business and determine the activities you have to implement to receive the business. You can more accurately invest your personal asset called Money and receive better Return on that Investment (ROI).
- **Personal Motivation**
When working Target Markets, successes come more often. That creates that feeling of achievement, which creates energy, enthusiasm and spirit. Continual successes and becoming an expert creates self-confidence and in turn you begin to value yourself more, increasing your self-worth and self-esteem. These are valuable assets that need to be present as a salesperson. Focusing on a Target Market makes it easier to get these motivational factors in motion. Add your own list of benefits to working within a specific Target Prospect and Client Market. There are many benefits including “feeling comfortable” with certain markets which makes it easier to make contact, especially in the beginning.

Now we will explore “how to” identify the best Target Prospect and Client Markets for you.

Identifying Your Best Target Prospect and Client Markets

In order for you to identify your Target Markets, you need to make a list of possible Target Prospect and Client Markets. We have given you a list of “Mind Joggers” or “Examples” that can help you think of specific Prospect Markets that may be wise for you to focus on.

Considering When Identifying Your Target Markets

When trying to identify your Target Markets, consider the following 9 points of importance:

- **Ideal Prospect / Client Description:**
Have a clear description of what an Ideal “A” Client, Ideal “A” Prospect or an Ideal “A” Referral Source is. You can achieve that by listing the “A” descriptions of the majority of the 8 to 10 Criteria you put together on the ABC Criteria Worksheets. By using this method we have described a possible Ideal “A” Individual Prospect / Client, an Ideal “A” Business Prospect / Client and an Ideal “A” Referral Source contact. They are as follows:

Ideal “A” Individual Prospect / Client

- Net Asset Value 500 000+
- Annual Gross Family Income 300 000+
- Easy to Approach / Excellent Natural Fit
- Married with or without dependants
- Could be within 10 years of retirement
- 30 000 or more per year in disposable income
- Family conscious ... cares about his / her family
- 40+, Professional, Executive or Entrepreneur
- Golf’s, Polo, Sails, Fly’s Hunts, Travels
- Centre of Influence, Status, Financially responsible

Ideal “A” Business Prospect / Client

- 15 or more white collar workers
- 50 – 500 Employees
- High Tech, Intellectual Capital Co, Manufacturer, Successful Farmer, Wholesaler
- Growing or already Successful
- 3 or less people as Decision Makers
- Within 30 minutes drive
- Part of a Network
- Good Name, Influencer and Status

Ideal Referral Source Contact

- Can introduce to you or “open the doors” to 12 or more “A” and “B” Referrals Per Year
 - Easy for you to Approach / Excellent Natural Fit
 - Lots of Mutual Benefit for both of you within the relationship
 - Most of the time Supplies to and / or Specialises in your “A” & “B” Type Prospects
 - Big Social Responsibility to Help Others with their Lives and Businesses
 - High Level of Credibility, Professionalism and Status with his / her network
 - Has had an Excellent Experience with You and / or Your Company in the Past
 - High level of Pro-activity and Motivation to give you excellent referrals
 - Successful at his / her Profession as an Auditor / Real Estate Agent / Business Broker, etc. (Professional Person)
 - Has Access to over 100 names of our A & B Type Prospects
 - Good knowledge and Understanding of our Industry and Products
- **Financially Responsible**
Especially note, will they be financially responsible, will there be minimum cancellations, returns and will the average size of the sale be worth your investment of Time, Energy, Ability, Money and reputation? Will they pay their bills?
 - **Easy Fit / Easy Assess**
Do you have an “easy fit” or “easy access” because of things like your past occupation, religious affiliation, club membership, family history or ties, community involvement, ethnic background, position you’ve held or hold now, your age, hobby or interest, cycle of live, business experience, expertise or the sharing of common situations and circumstances?
 - **Size**
Is the Target Market large enough for you to continually work?
 - **Passion / Enjoyment**
Would you be passionate about learning more about that Target Market and would you enjoy working with individuals and companies in that Target Market?
 - **Knowledge / Expertise**
Do you have the knowledge or expertise or can you easily develop the knowledge or expertise to capitalise on that Target Market? That can include Knowledge of your own products, services and industry.
 - **“Centres of Influence” Contacts**
Do you already have “Centres of Influence” contacts in the Target Market that can assist you in quickly penetrating that Target Market?
 - **Geographically Convenient / Concentrated**
Geographically will it be easy to work and are the individuals geographically concentrated.
 - **Similar Needs**
Do most of the members, individuals or businesses in that group have similar needs? It becomes easier to service and to become an expert if they have similar needs.



Selecting Your Prospect / Client Target Markets

We are providing you with a list of “Mind Joggers” to assist you in defining the 2 to 5 Target Markets that you believe will be most beneficial for you to focus on. We’ve integrated both Individual Segment and Business Segment “Mind Joggers”

1. Review the list and make notes of any possible Target Markets that come to mind. Utilise the Target Market Mind Joggers Worksheet on the next 3 pages.

Target Market Mind Joggers –Worksheet # 1

Group	Mind Joggers / Examples	Ideas / Notes
Geographic	<ul style="list-style-type: none"> • Neighbourhood / Town - Worked or Lived - Certain Industries Concentrated • Office Building • Corporate Head Office • Apartment / Housing Complex or Estates • University, Business Schools, Technikon • Specific Farming Communities • Other 	
Social, Religious Business Groups	<ul style="list-style-type: none"> • Golf and Country Clubs • Sports, Hobby and recreations Clubs • Health and Fitness Clubs • Sports Leagues • Non-Profit Groups & Worthy Cause Groups • Chambers of Commerce and Business Associates • Women in Business Associations • Churches, Synagogues, Temples etc. • Women in Business • Upwardly Mobile and Affluent Black Groups • Franchise Owners, Retailers, Manufacturers • Importers, Exporters • Call Centres, Sales People • Small Businesses • Other: 	



Target Market Mind Joggers –Worksheet # 2

Group	Mind Joggers / Examples	Ideas / Notes
<p>Occupational and Business Sector Groups</p>	<ul style="list-style-type: none"> • Professionals – where you already have clients and friends • Occupation you were preciously employed • Staff of a specific group / company • Government bodies (e.g. Municipalities, Boards, Hospitals etc.) • Sections of Government Services (Police, Defence forces, etc.) • Other: 	
<p>Groups of People that would most likely use or need specific products or services you offer.</p> <p>List Your Main Products/Services below.</p>	<p>Examples:</p> <ul style="list-style-type: none"> • Business Insurance ... SME's • Telephone Training ... Call Centres • Education Products ..P arents of Children • Security Guards ..B ody Corporates • Stain Proof Table Cloths ... Restaurant / Hotels <p>List Those Who Would Need Or Want Those Products Or Services below.</p>	



Target Market Mind Joggers –Worksheet # 3

Group	Mind Joggers / Examples	Ideas / Notes
<p>Language, Cultural and Ethnic Groups</p>	<p>Language, Culture and Ethnic Groups:</p> <ul style="list-style-type: none"> • Nationalities / Specific Groups – Dutch, French, Zulu, Xhosa, Sotho, Venda, Afrikaans • Cultural or Special Interests • Other: 	
<p>Special Needs Group “Constantly changing and New Opportunities appear”</p>	<ul style="list-style-type: none"> • New Homeowners • New Parents • New Business Owners • People getting Married • New Projects • Physically Challenged • New Building Development • New Events • New Laws & Regulations • New Competitors • New Technology • New Upwardly Mobile Group 	
<p>Other Groups</p>		

2. List up to 15 Possible Target Markets on Worksheet #4, Identifying Your Top Target Market “Form”. Then using the “weighting number” on the form and your “common sense” decide on your top 2 to 5 Target Markets.



Worksheet #4

IDENTIFY YOUR TOP TARGET MARKET FORM										
Target Prospect Markets/Groups	Ideal Prospect Financially Responsible	Easy Fit Easy Access	Size	Passion and Enjoyment	Knowledge and Expertise	Centres of Influence Contacts	Geographically Convenient & Concentrated	Similar Needs	TOTAL	Priority Sequence
	0 - 25	0 - 20	0 - 15	0 - 10	0 - 10	0 - 10	0 - 5	0 - 5		
1.										
2.										
3.										
4.										
5.										
6.										
7.										
8.										
9.										
10.										
11.										
12.										
13.										
14.										
15.										

Once you have selected your Top 2 to 5 Target Markets go to Target Market / Group Worksheet # 5 and write in your top 5 Target Prospect Markets / Groups and in order of priority explain why you have chosen them.



Target Market / Group Worksheet –Worksheet # 5

Select your top 5 Target Prospect Markets / Groups, write them down in order of Priority and explain why you have chosen them:

Target Prospect Market	Why you chose it?
1.	
2.	
3.	
4.	
5.	

Caution! Caution! Caution!

You now have a good idea of what an Ideal Prospect / Client looks like, plus you've got 5 Target Prospect Markets or Groups you can focus on to find those Ideal Prospects / Clients. The process you've just gone through helps you focus and that is great, although it could sometimes limit your opportunities.

A word of caution! While you are pro-actively focusing on your Target Prospect / Client Market, also don't turn down Non-Target Prospect Market "Prospects" that cross in front of you or express a need. That is often how you find New Target Markets and in the short term, how you reach Sales Targets.

So, your personal mission statement for building your business could look like this:

"The majority of my pro-active Time, Energy, Ability, Money and reputation is focused on the Women in Business Market and the ANC Members. In addition I will capitalise on any other good quality Prospects that are referred to me or cross my path even if they are not from my two Target Prospect Markets."

Read about Your Prospecting Pool on the next page and then go to the following exercises:

- Exercise 2: Possible Prospect Sources for Prospects in Your Target Market
- Exercise 3: Referral Source Names
- Exercise 4: Top 10 Referral Sources
- Exercise 5: Approaches

Developing A Prospecting Plan Strategy

What is a Prospecting Plan Strategy?

"A Prospecting Plan Strategy is an actual strategy designed to "identify" and "access" all the possible companies, organisations, places, people, functions, events, list sources, publications and other prospect sources to find and receive Prospect names and make contact with as many target Prospects as possible."

Your Prospecting Pool

To succeed as a Salesperson or business owner it is vital that you continually prospect for new clients, especially if you are new in the business.

You have already identified what a good Prospect or Client looks like for you. You also identified 5 specific Target Markets that you have decided to focus on. And last, but not least, you've described the criteria for a good Referral Source – a person who can provide you with good Prospects.

To help you with sourcing Prospect names, we are supplying you with a list of over 50 possible sources where you could gain access to Prospects. The key will be when you build your own list of Prospect Sources, is to make sure "You go fishing where the fish hang out." You do that by utilising your criteria you've put together for Prospects, Clients and Referral Sources to make sure you are focusing on places, sources and markets where your best Prospects, Clients and Referral Sources would be or where you could find their names.

Following is a list of over 50 different sources for you to draw from to build a "Prospect Pool" and keep it full.

1. Professional firms
2. Estate Agents
3. Data Bases
4. Un-serviced clients still on our books
5. Division within our organisations or affiliated businesses
6. Municipalities – Homeowner Roll (List)
7. Professional Associations
8. Internet – searching it by industry, services and names
9. Chamber of Commerce
10. Landlords
11. Property Managers
12. Business Brokers
13. Schools
14. Universities
15. Unions
16. Government Departments
17. NGO's
18. Female Associations (Business Women's Association. Etc.)
19. Institute of Directors
20. Newspaper Articles
21. Enterprise Magazines
22. Existing Clients (Happy)
23. Networking Clubs
24. Niche Banks
25. Exhibitions/Conventions/Trade Shows
26. Seminars/Conferences
27. Business Suppliers and Personal Suppliers
28. Clubs/Places of Worship
29. Relatives/Friends/Past Employers
30. Who's Who Publication
31. Trade Publication
32. Newsletters
33. Specific events and functions
34. Social meeting places
35. Vehicle Signage
36. Point of contact – our type of customers, e.g. Business cards (printer)
37. Newspaper and magazines in general
38. Maternity Wards
39. Children's Crèche
40. Tenants of buildings
41. Florists
42. Home loan consultants
43. Time share consultants
44. Holiday clubs
45. Company telephone directories
46. Club telephone directories
47. Switchboard operators
48. Courts "Marriage Court"
49. Weddings: Suit hire, photography, tent hire, caterers, chair hire
50. Embassy's, Consulates, Trade Commissioners
51. Funerals.
52. Purchased Census Lists
53. Other Purchased Lists.

Please go to Exercise 2: Possible Prospect Sources for Prospects In Your Target Markets.



**Exercise 2: Possible Prospect Sources for Prospects
In Your Target market**

Take your two top Target Prospect Markets you selected and list all the possible Prospect Sources that could “open doors” to you finding and receiving Prospect names and even making contact with good Prospects under those two Target Prospect Markets.

Target Market #1

All possible Prospect Sources including companies, organisations, places, people, functions, events, list sources, publications, etc.

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____
11. _____
12. _____
13. _____
14. _____
15. _____
16. _____
17. _____
18. _____
19. _____
20. _____
21. _____
22. _____
23. _____
24. _____
25. _____
26. _____
27. _____
28. _____
29. _____
30. _____
31. _____
32. _____
33. _____
34. _____
35. _____
36. _____
37. _____
38. _____
39. _____
40. _____



Target Prospect Market #2

All possible Prospect Sources including companies, organisations, places, people, functions, events, list sources, publications, etc.

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____
11. _____
12. _____
13. _____
14. _____
15. _____
16. _____
17. _____
18. _____
19. _____
20. _____
21. _____
22. _____
23. _____
24. _____
25. _____
26. _____
27. _____
28. _____
29. _____
30. _____
31. _____
32. _____
33. _____
34. _____
35. _____
36. _____
37. _____
38. _____
39. _____
40. _____



Exercise 3: Referral Source Names

List as many specific Referral Source Names as possible in your top 2 Target Markets. Classify them as A, B or C. if you want to you could include all Referral Source names for all your Target Markets.

Names of Possible Referral Sources

Name	Position	A/B/C
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		
10.		
11.		
12.		
13.		
14.		
15.		
16.		
17.		
18.		
19.		
20.		
21.		
22.		
23.		
24.		
25.		



Exercise 4: Top 10 Referral Sources

Pick your top 10 Referral Source People from Exercise 3 and list them in order of priority, classify them as A, B or C and explain why you classify them the way you have.

Referral Source	A/B/C	Why?
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		
10.		



Exercise 5: Approaches

Write out 5 different approaches you could use to approach 5 of these top 10 Referral Source People in Exercise # 4 to assist you with names of Prospects or introductions.

Source Person	Approaches
# 1	
# 2	
# 3	
# 4	
# 5	

Effectively Managing Your Referral Source Relationships

Building a strong Referral Source Network that is focused on the “A” Type Prospects you wish to do business with can make your job as a Salesperson / Business owner ten times more effective and profitable. Some of your Referral Sources may also enter into a formal relationship with you as someone who gets a fee for referrals. The key is not just to get a few names once from your Referral Source. It is to handle that Referral Source relationship in a way that you receive referrals continuously. Here are a few tips on making sure the referrals keep coming and the Referral Source is happy.

- Make the relationship win / win. Don't just be a taker. Bring them referrals and business as well. Buy from them if you can. Add value even as a resource or through genuine assistance.
- Understand their products and services as well as their own personal and business agendas and goals. That way you can be of assistance to them.
- Be fast on servicing the “referral prospect” that they referred you to. Keep them abreast of the progress with the prospect. Report back to them and they will often give you more referrals.
- Always protect and enhance the Referral Source's “image and standing” with their client or contact.
- Be credible and trustworthy at all times. Your Referral Source's name is on the line.
- Be thorough. Do a Needs Analysis and present solid advice and solutions.
- Keep your promises and continue with proper service with the new client. Word will get back to your Referral Source. Go the extra mile.
- Be available and accessible to the Referral Source. Respond quickly. Let your support people in your office know how important these Referral Source Contacts are to you.
- Give rewards, thank you's, incentives and special treatment to your Referral Sources.
- Set up a Frequency of contact Database Follow-up Strategy with your referral Sources.

What we are really saying here is this. Your Referral Source can add phenomenal value to you in building and sustaining your business, so look after them as if your life depends on it ... because it does.

Note

We have included on the next page a Prospecting Pool List Form. Continually update and add to it. Take the time now to fill it up. Make copies of it before you fill it up, so you can have some spare ones.

The Principles Work

- John Duncan, an “Active Pensioner” with one of the large Assurance Companies reduced his client list from about 1500 clients to 100 or so when he semi-retired. Other Financial Advisers took over the 1400 clients and John kept 100 of his top clients. Just focusing on those 100 clients 3 days a week he had the biggest year ever. Continuing with the same focus 3 days a week last year he was up another 25% in sales....and that was in a depressed industry market that got severely hit by the strong rand. It goes to prove that if you focus on the Right Clients and Prospects it pays big dividends.
- “We are now Targeting according to “potential”. We found that with some clients who were giving us R10, 000 worth of sales per month are now giving us more than we had expected. This is a result of Targeting according to potential” (Utilising Criteria Works). “We have become more focused, (ABC Categories) and specialised (Target Markets) and this is building better relationships. We are using better time management.”

These are comments from Terrance Minter the spokesperson for a team of Medical Representatives at the Generic Division of Adcock Ingram a leading Pharmaceutical Company in South Africa.

Summary

Once you've worked through the Worksheets and Exercises, what you will have received from this module will be the following:

1. A 4 Step Process to deciding what Criteria to use within selected Segments or Groups to identify your best Prospects, Clients, Referrals Sources and Projects.
2. A method to segment your Prospects, Clients and Referral Sources into A, B and C's under the Retain, Develop, Regain and Gain Strategies Columns.
3. How to select a Target Market and then identify the Best Prospect Sources and Best Prospects in those Target Markets.
4. Build a Prospect List.

We will now move on to Module 3 – Making Data Base Selling Pay.

Module 3

Making Data Base Selling Pay

Learning And Sales Development Outcomes

In this module you will:

1. Learn how to utilise Frequency of Contact with the Primary; Secondary and Other Tools of Data Base Selling.
2. Learn about and set up your own Multi-Layered Most Valued, Most Potential, Most Wanted Data Base Selling Program.

***Ntsika Enterprise Promotion Agency,
with a focus of rendering non-financial support to SMME's
is part of The Department of Trade and Industry in South Africa.
Ntsika, along with the support of The European Union
assisted in the Initial Development of the
Boosting Sales & Profits With Focus Selling program
in conjunction with Knowledge Brokers International Limited.***



Module 3 Making Data Base Selling Pay

The most effective element in advertising is frequency. If you reach 10 000 of the right people ten times, rather than 100 000 people once, your advertising dollars will be much more productive. To obtain more frequency, run several commercials on the same television program or the same radio time block on the same news cast every morning, or run several ads in the same newspaper on the same day. The key to obtaining value from frequency is to increase impact by reaching the same consumer several times.

A one-time pizza commercial on a late night movie will have to be a great mouth-watering event to motivate a consumer to purchase. The same commercial run several times during the show can dramatically increase response. Even though you may reach a small number of people, if they are the right people and you reach them enough times with the right message to make them respond, and if it is affordable, you have effective advertising.

To get maximum return for personal assets invested, the same principle applies in selling. We call it Frequency Selling, or Data Base Selling. The principle is quite simple.

“It is better to reach 50 of the Right Prospects
and Right Clients 20 times with the Right Methods
rather than 1000 Prospects or Clients ONCE!”

As the reader and as a consumer you see why this makes sense.

In selling you only have so much **Time, Energy, Ability, Money** and **Reputation** to invest.

You may have 1 000 potential buyers in your market. If you set up a plan over 6 months to call on approximately 8 different clients per day at the end you would have covered the 1 000 potential clients. Because you were trying to cover all 1000 over 6 months you have no time to see anyone a second, third or fourth time.

A commonly used set of figures often used in sales training that seems to back up the frequency principle in selling, is **Sales Conversion Ratio** and the **Why Frequency Works Study** by the National Dry Goods Association of America. Do a quick review of these two slides shown in Module 1.

Sales Conversion Ratio (100 Competitor's Clients Converted)		
Calls	Converted	Percentage
1st	2	2%
2nd	3	3%
3rd	4	4%
4th	10	10%
5 th and Onward	81	81%

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- ### Why Frequency Works
- 48% of all sales people make one call and after a sold "NO" from a potential client - they stop calling
 - 25% make two calls and stop
 - 15% make three calls and stop
 - 12% make three calls and continue. These people are responsible for 80% of all sales
- Source: National Dry Goods Association of America Survey
- Boosting Sales & Profits With Focus Selling®
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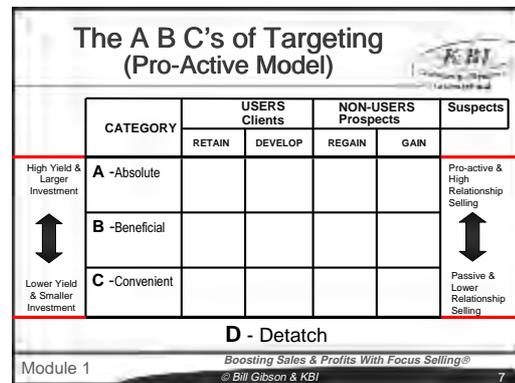
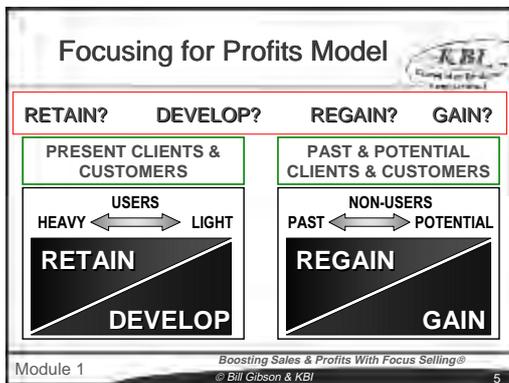
When you look at the 7 phases of **The Natural Sales Cycle** it is easy to see why it may take 5 or more contacts with a potential client, who is with a competitor, to actually get them to do business with you. See the slide on the next slide.

The Natural Sales Cycle

The Natural Sales Cycle



The 1st contact may be Warming Up The Call by means of making a telephone call.
 The 2nd contact may be Breaking the Ice by means of getting comfortable with each other
 The 3rd contact may be Uncovering Buying Motives by means of gathering additional information.
 The 4th contact may be making the Sales Proposal or Presentation
 The 5th contact could be Handling Objections and Questions
 The 6th contact may be Closing the Sale
 The 7th contact could get you the add-ons, and up-sell
 As you know these seven phases could all happen in one or two meetings. This would depend on the need, ability and desire to buy.
 It is important to understand that the Sales Conversion Ratio is focused on Conversion Business. This means converting clients from the competition to you. This is very important information when you look at the "Focusing for Profits" model we studied in Module 1.



Your company's present heavy user clients fit under the Retain list. Frequency of contact is the way you built this client and is one of the main strategies that you will use to keep the relationship intact.
 As stated before, the danger of putting all your focus on this group is that they may be maximized with services (Are at capacity and just cannot buy more). That means your growth has to come from other places. Also if you lose some of these clients, they have to be replaced.
 If you've been in business for a while, the number one place to look for growth is with your present light users who are heavy users of similar services or products in the industry.
 This means they are users of products and services with one or more of your competitors. These are the ones you want to **Develop**. This means you have to get them to convert all, or most, of their business to you. Frequency selling or Data Base Selling is a big part of this strategy.
 Clients you want to **Regain** and those you want to **Gain** are probably already using your competitors' products and services. Again the conversion ratios help to understand why you need to not give up after the first, second, third, fourth or fifth call.
 81% of all conversion business is done in most businesses from the 5th call and onward.

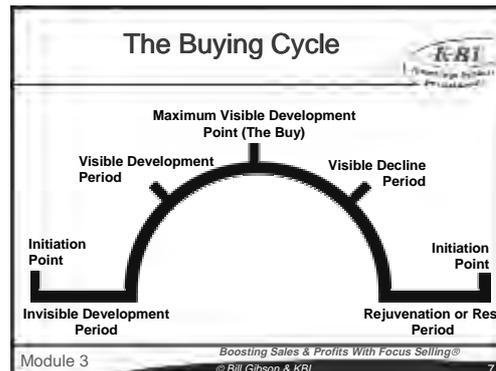
As you can see, understanding frequency and using it in the sales process can dramatically increase the results you have been getting. In the first module **Focusing For Profits and Module 2; Identifying The Right Clients / Prospects and The Right Markets**, you have identified your target group. This module shows how to set up a data base selling system (frequent selling strategy) to help ensure you will get results for the effort put in.

Note: The Sales Conversion Ratios may vary with different industries, different products and services, different priced items and services and the difference in the ability of the salesperson.

Remember these are **Conversion Ratios** - meaning you take the customer from someone else. We are not talking about ratios in reference to new clients that **are not** with the competition.

It would take less focus with someone who does **not** have a relationship with a competitor.

Buying Cycles



There are client buying cycles with most products and services and it is important to understand them. Lets walk through the Buying Cycle of an automobile, which is a product most of us as consumers purchase every three to five years.

Initiation Point

You take your car in for servicing. It is three years old. At the end of the day you arrive to pick it up. The service manager tells you he has some good news, and some bad news for you - "which do you want first?"

You say, "Give me the good news first." He tells you your car is going to cost you R 2000 for the work that was done and that is the good news. The bad news is that it is going to cost you R 20000 to keep it on the road over the next year. He tells you not to worry, because the car is fine for a couple of months, but when you start to hear that little tick! tick! knock! knock!, hiss! hiss! You will know the trouble is beginning.

Two months later you are out for a drive with a friend and he says to you: "What is that tick! tick! knock! knock!, hiss! hiss! I hear?" You say, "That is R 20000 down the drain."

This is called the initiation period of a buy. You begin to think about whether or not you should spend the money fixing the car or trade it in and buy a new one. The buying cycle has been initiated. This is the Initiation Point.

Invisible Development Period

At this point you begin to start noticing all the different models of cars on the road. As a matter of fact you are surprised by how many models there are on the road. You begin to notice ads and articles in magazines and newspapers, and you easily pick up on TV and radio conversations concerning new cars. At this point most car salespeople would not be aware you are in the cycle of buying unless the service manager or relation or friend tipped them off.

You are well into the Invisible Development Period of the buying cycle.

Visible Development Period

This is the phase when you start asking questions about different makes of automobiles. You ask friends, relations and strangers and then when you are close to buying you walk onto the car lots of automobile dealerships. You are now close to the Maximum Visible Development Period which is the time during which you buy.

Maximum Visible Development Period

80% of the people who walk onto a car lot or into the showroom of a car dealership will buy or influence someone else to buy within a week or so. The reason for this is that they are at that maximum visible development period. It is at this stage that salespeople end up closing new business without having had to make several contacts or even build a relationship. The client is ready, willing and able or has the need, ability and desire.

Visible Decline

After the purchase is made you go into a Visible Decline. The decline is visible because you are still interested in cars. You still compare what you bought and you have a tendency to share your excitement with others. Gradually your interest in your new car fades.

Rejuvenation Or Rest Period

At this point you do not put much time into thinking about cars. You will probably be focused on buying a house, preparing for an overseas vacation or buying furniture. This is the rest period in the car buying cycle for you until a couple of years later you take your car in for service and you hit the Initiation Point again.

If you understand buying cycles and you take the time to study your different clients' actual buying cycles you will know when to be talking to them. If you are there during the Invisible Development Period, the client may never talk to the competitors.

Also, if you are investing personal assets in a frequency selling or a data base selling strategy to A-group clients, frequency contact throughout the cycle will give you the edge over competitors who do not use this method.

Your Data Base System

At this point you understand the philosophy of "It is better to reach 50 of the right clients 20 times over six months or a year with the right method than it is 1 000 people once."

It is great that you now understand the theory, but it can be quite a challenge to put this theory into Action. The best way to do this is to develop your own Data Base Selling System and utilize that System.

Now, for many people when you say "Data Base Selling", they think computers and software programs. I am going to suggest that computers and software programs are not a Data Base Selling System; they are tools that can make Data Base Selling more efficient.

You can implement Data Base Selling by utilizing a small cardboard or metal box with cards that fit the size of box, or you could use a ring binder, rolodex or a file drawer of files. The computer is just the box binder, rolodex or file drawer that holds the client information.

So, if you are not comfortable utilizing a personal computer, lap-top or notebook computer, you can still utilize the concept of Data Base Selling. Before the invention of lap-tops and Personal Computers, most successful salespeople utilized the Data Base Selling approach to building their business with their own system of control.

Lets look at a real simple way to describe what Data Base Selling really is.

"Data Base Selling is when you gather together a list of the names of Present and/or Potential Customers in one place. This becomes your Base of Data on your potential and/or present clients who you systematically contact on a frequent basis, using a number of different methods with the purpose of gaining the business."

Keeping this in mind we will now look at a step by step approach for each salesperson to set up their own Data Base Selling System.

Step 1: Choose Your Method Of Operation

What kind of method will you use to hold and keep the data on your clients?

Here are some basic options.

- **Computer:**

A Personal Computer, Lap-top or Notebook computer is one of the options. The level of your mobility, your ability with a computer, and the type of business you are in, would determine the type of computer you should use. You may already be utilizing a computer for your Data Base.



- **Box of Cards:**



This is a very simple system. You set up your data on your clients file A - Z in a small box. You could even take this box with you in you car if need be. It is small but mobile.

- **Ring Binder:**

Once again you could work with a couple of ring binders with your data base of clients lists alphabetically. This system is even more mobile than the small card box.



- **Rolodex:**

A Rolodex wheel with your clients list on the rolodex cards in alphabetical order is another approach to setting up a Data Base.

- **Files:**

A drawer with file folders within a filing cabinet could also be your method of operation.





Any of these methods could be utilized to keep track of all clients or potential clients you do business with and/or want to do business with. When you move to a Data Base approach to selling, it is important to notice that you cannot contact all clients with the same frequency of calling. You only have a certain amount of time and energy, so the heavy frequency of contact should only be done with a select group that gives you your best return on personal assets invested.

The mistake that is often made is that we take the time to gather together 2000 possible buyers' names in an attempt to collect all the pertinent data, put them into a data base and start working our way through the list. Very few salespeople have the time to thoroughly cover all 2000 so it is better to select a small group of clients or potential clients that fit into your A-group and set up a smaller but more lucrative data base that you can work thoroughly.

An option is that you have a large data base of B's and C's that helps you keep track of what you do in reference to sales with your entire client base, but you set up a specific data base system for working the selective or potential clients.

Step 2: Set Up An Information Format

What is meant by an information format?

This is the format of information you will have on each client or potential client. The format may be on your computer program and a hard copy of it would be the print-out. The format could be on the small cards in your filing box, a page in your ring binder, on a rolodex card or on/in a file folder.

The use of a computer, reasonably sized cards, or an A4 or letter size sheet for a ring binder will give work room for the information.

- At this point stop and review the example of an Information Format. The first one is one used in the selling of this sales training program. This is a corporate example.
- The second example is one that could be used by someone selling automobiles to individuals.

My personal experience suggests that a salesperson should not try to over do it in reference to structured client details on the client information sheet. Get the basics and the pertinent information down on the sheet (criteria for deciding whether the client belongs in the A, B or C-Group). Then, have room for notes and actions.

Later in Module 6 we will explore the more in-depth "Need Analysis" approach to gathering information. The Client Information Sheet is not a needs analysis. It is a tool that you use each time you are going to contact the client.

Review the samples on the next couple of pages.

"Source of Business" is very important. You should always know where the client came from, e.g. specific advertising, a certain event and referred by whom.



Client Information

Page: _____

Date: _____		Source of Business _____			<input type="checkbox"/> A <input type="checkbox"/> B <input type="checkbox"/> C	
Name: _____					<input type="checkbox"/> Male <input type="checkbox"/> Female	
Address: _____					<input type="checkbox"/> Single	
_____					<input type="checkbox"/> Married	
_____					<input type="checkbox"/>	
Res. Number _____	Cell Number _____	Wk. Fax Number _____				
Res. Fax Number _____	WK Number _____	E-Mail Number _____				
Age: 18 - 29 <input type="checkbox"/>	30 - 39 <input type="checkbox"/>	40 - 49 <input type="checkbox"/>	50 - 59 <input type="checkbox"/>	60 + <input type="checkbox"/>		
Employer: _____						
Address: _____						

Position: _____ Approx. Income: _____						
Spouse: _____						
Age: 18 - 29 <input type="checkbox"/>						
30 - 39 <input type="checkbox"/>						
40 - 49 <input type="checkbox"/>						
50 - 59 <input type="checkbox"/>						
60 + <input type="checkbox"/>						
Cell Number: _____ WK. Number: _____ Wk. Fax Number: _____						
Employer: _____						
Address: _____						

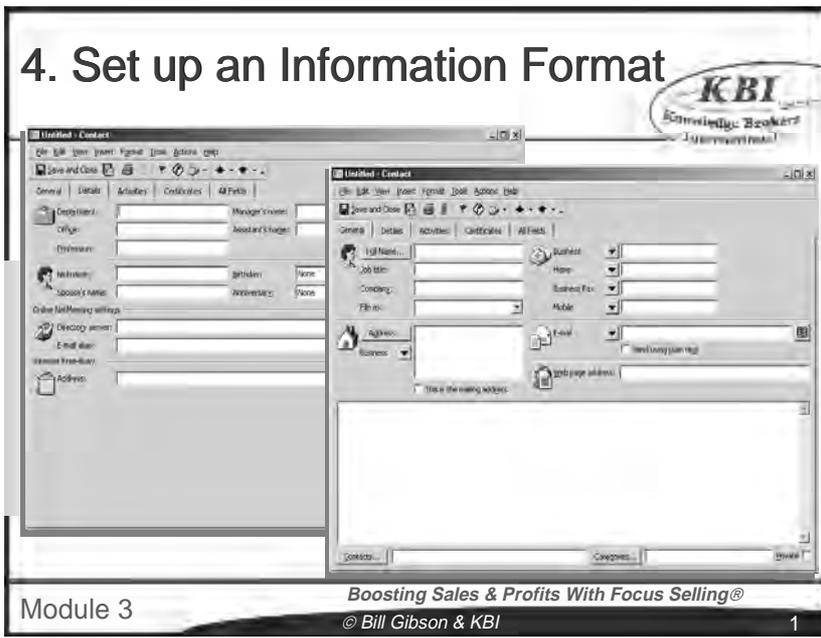
Position: _____ Approx. Income: _____						
Number of Dependents		Dependents Names		Age	Relationship	
_____		_____		_____	_____	
_____		_____		_____	_____	
_____		_____		_____	_____	
Vehicles Owned		By Whom		When Bought		
_____		_____		_____		
_____		_____		_____		
_____		_____		_____		
Strategy: <input type="checkbox"/> Retain <input type="checkbox"/> Develop <input type="checkbox"/> Regain <input type="checkbox"/> Gain						

4. Set up an Information Format

Date: _____	Source of Business: _____	Group: _____	A: _____	B: _____	C: _____
Company Name: _____					
Address: _____					
Nature of Business: _____					
No of Sales People: _____	Training budget: _____	Total Staff: _____			
Position: _____	Contact 1: _____	Contact 2: _____			
Tel No Work: _____					
Tel No Home: _____					
Cell No: _____					
E-mail: _____					
Fax: _____					
Best Time to contact: _____					
Assistant: _____					
Assistant Tel No: _____					
Other Contacts: _____					
Date: _____	Actions/ Notes				

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10



Pending File

The “Pending File” approach to follow-up is an age old method of ensuring follow-up. If you are using boxes as your method of controlling your client cards, get two more boxes to work with your main base of clients. Your system would look like this.

Box 1:

Your main base of clients filed in alphabetical order, A to Z.

Box 2:

A box with monthly dividers. January through December. If you are in the month of March and you promised to contact someone on May 12th, you take the client card from Box 1 and drop it in the month of May. Another option would be to drop a reminder card in the month of May with the client name and promise to do for May 12th. Now on the last day of April, pull all the cards in May and file them in Box 3.

Box 3:

A box with dividers from the 1st day of the month until the 31st day. The May 12th promise will be dropped into the May 12th slot. Review the days of the month box daily. On May 12th you will see what you promised. This is a simple, but effective system.

You can do exactly the same with:

Binder 1: Your main base of clients filed in alphabetical order.

Binder 2: January to December monthly dividers.

Binder 3: The 31 days of the month.

Or

File Drawer 1: Your main base of clients filed in alphabetical order.

File Drawer 2: January to December monthly dividers.

File Drawer 3: The 31 days of the month.

There are many options in reference to reminder systems. Because we have trouble remembering our promises, choose one that makes sense at this time and put it to work. Without a reminder system the data approach to selling does not work. (This process is a Software Program for most people today).

Step 3: Utilise The Primary Tools Of Data Base Selling

When most people think of the Data Base approach to doing business, they do not only think computers and software programs, they think **direct mail** as well. The **primary tools** of data base selling do not even include direct mail. If you only used the primary tools, and you used them frequently and effectively, you would be very successful as a salesperson.

Let’s look at what these **primary tools** may be:

Personal Sales Calls, Visits, Deliveries

This is the number one tool in Data Base Selling. You have to have that face-to-face contact. Once again you are reminded of the importance of targeting the right client, especially when utilizing the personal sales call, visits and deliveries. The personal sales call is the one that requires the biggest investment of your personal assets. Modules 4 to 9 will be devoted to improving the skills of even the seasoned professionals, in the art of the personal sales call, personal contact and effective communication.

The exception to this rule may be when your entire business is set up in such a way that the telephone is actually used as the personal sales call. For example: A Tele-Marketing company selling computer paper nationally via a telephone sales force.

Personal Lunches, Dinners, Breakfast, Coffee

The power of lunches, dinners, etc. is that you are actually with the clients outside their own work environment, away from the phone, in most cases for a specified time. The atmosphere is usually less formal and it allows both you and the client to relax and open up. People are also grateful when you have paid the restaurant bill.

A few tips on lunches/dinners:

- Find out what kind of food they prefer.
- Know how much time they have and pick the restaurant accordingly.
- Always be courteous to waiters, waitresses, maitre-d, etc. It is often in restaurant situations where the **real character** of an individual shows up.
- If you do consume alcohol, monitor whether or not you drink, based on what the client is drinking. When they say mineral water and you decide to have one you have immediate rapport. If you do not want to drink let them know about your next meeting, etc.
- Reserve a table in advance.
- Where possible go where you are personally recognized and respected.
- Be early.

Bringing Them To Functions And Events

Personal invitations to functions and events once again develop strong relationships. Some salespeople actually pick their clients up and drive them to the function or event and home.

Examples of functions and events are:

- Playing Golf
- Attending Sports Games
- Going to Entertainment Events
- Special celebrations
- Cocktail parties, launching new products etc.
- Attending a seminar, conference
- Visiting a Trade Show
- Association or special company banquet

These kinds of events and functions are extremely effective when your client gets special recognition for something he or she has done.

Coincidental Encounters

With your real top clients or target group of potential clients it is not difficult to go the extra mile to gather information, such as what clubs and associations they belong to, what events they frequent and even what restaurants they regularly eat in.

How do you utilise the information to your benefit?

It is simple. If I am the client and you know I regularly eat at a certain restaurant you would be wise to buy another non-competitive client lunch at that restaurant. It is highly likely you would coincidentally bump into me. This is one more time you have face to face contact.

Telephone Calls

As some telephone companies say in their advertising, the telephone is "the next best thing to being there". A personal visit via the phone allows you to cover many clients faster, yet you still have that live "personal touch".

There are many reasons why you may utilize the phone to contact the client. Here are a few examples:

- Inform the client or potential client of an event that is coming up, or give information that is in a magazine, etc. that he or she may find useful.
- Let the person know you are sending someone to do business with his or her company.
- Give information that was requested.
- To personally invite the client to a function.
- To give new information about your product or service he or she may be interested in.
- To update your files.
- To congratulate him or her on an accomplishment.
- To say thank you for taking time with you, or for a kind gesture.

The list is endless. The telephone can really help you keep up the frequency of contact.

Personally Delivering Gifts and Promotional Items

This is where you personally drop off gifts or promotional items to the prospect or client. Before moving on to the secondary tools, reflect for a moment on what kind of impact it would have if a client was:

- Receiving lots of helpful personal visits from you
- Regularly attending enjoyable lunches and dinners with you.



- Participating in business functions, social and sporting events that he or she enjoys on a regular basis with you and your company.
- Coincidentally bumping into you once a month.
- Having regular useful telephone contact with you.

It is easy to see how so many clients and potential clients actually become friends rather than just business associates.

Now let's look at the **Secondary Tools** of your Data Base Selling System.

Step 4: Utilise the Secondary Tools of Data Base Selling

Personal Assistant Contact

Although it is not you, a personal assistant calling on your behalf in person or on the telephone, is effective in building and keeping the relationship together. Many top producing salespeople have personal assistants. If you do not have a personal assistant, it could be the group sales secretary making contact on your behalf or even your sales manager. The danger with this is when the salesperson literally ignores the client and leaves it all up to the personal assistant. The personal assistant should not act as a replacement for you, the salesperson. The personal assistant should act as an additional benefit to the client.

Support, Service Person Or Technical Person Contact

Contact from a support, service or technical person, especially if the salesperson's name is mentioned acts as an additional aid to relationship building with the client.

- For example: A engineer phoning to answer specific technical questions.
- A service manager phoning up to see how satisfied the client is, or a service manager phoning a potential new client to give information on how they will be serviced if the business is gained. It could even be a personal promise by the service manager to the client.

Present and potential clients have less defence mechanisms against support and service people, than they do with salespeople.

Fax Contact/ E-mail/ SMS- Specific Personal Messages

Most people will respond much quicker to a full page fax than they will to a little message given to them from a telephone message pad with only a name and phone number or your e-mail being one of 200 she receives per day along with dozens of spam mails.

Utilize the fax to keep in contact. It allows you immediate contact and does not limit your number of words. The fax can also be used in a creative way to get a response. Here is a real life situation I had (Bill Gibson). "I personally had a situation where I briefly met with a potential client in Vancouver, Canada a week or so before I was to leave for a three week business trip to South Africa. The client asked me to call him the next week so we could get together before I left for South Africa. At that time we would talk about what I could do for his company on my return."

I called the gentleman six times and he did not call me back. My final reaction after six telephone calls was "This man does not want to do business with me". I almost gave up and then it hit me I had not even used my creative faculties to get a reaction. So I sent a fax similar to this one:

- "Jim, when I talked to you last week you asked me to call you this week to set an appointment before the end of the week, so that we could discuss what I can do for you when I arrive back from South Africa in November."

I have called you 5 or 6 times and have not heard from you. You are obviously very busy like most people today, or an emergency or priority has come up and you have not been able to get back to me. To save you time and energy please **do not phone me!!** Just tick (✓) the appropriate box and fax back.

Yes Bill, I would like to meet you in my office at either 9am or 1pm on Friday, October 2 to discuss what you can do for us when you arrive back from South Africa.

Bill, I cannot see you this week but I will phone you at ____ am on Thursday and/or _____ am on Friday and we will have a telephone meeting.

Bill, I just cannot see you or talk to you this week. Call me as soon as you arrive back from South Africa.

Bill, at this time we have decided not to use your services.

Bill, please lose my phone number and stop bugging me!☺"

Guess which box he ticked! It was the last box. He then called five minutes later laughing and we set an appointment. The fax got his attention. I used the same approach, with Dawn Jones of Imperial Car Rental and landed a speaking engagement.

Sometimes humour can be effective. A fax that I utilized for people with whom I have a relationship, but they are **slow** in paying me, usually because of just not getting around to it, goes something like this:

Page 1: Charlie! Please close your left eye and read the next page.

Page 2: If you do not pay your bill, this is the way you will be reading for the next two weeks! ☺

It is also important to make sure that your fax sheets are attractive and really stand-out. Handwritten faxes are fine providing your handwriting is legible and it is not a proposal.

If you send a fax to someone, be sure to phone or ask them to verify they have received it. You can walk away from the fax machine thinking the person received the fax when in essence:

- It went to a wrong fax number because you dialled incorrectly.
- It went to the wrong place because you had the wrong fax number on it.
- Someone at the other end took it from the fax machine and misplaced it or forgot to give it to the person.

Design your fax sheet so you have the client's phone number on it as well, so it is easy to phone. Also make sure both your fax, phone and E-Mail numbers are on your fax sheet so they can respond by fax or phone or E-Mail.

The same applies for e-mails. Make them attractive and phone or even fax after you send important ones. SMS messages are also as effective if not more effective as e-mail today. In S.A. lots of people have cellular phones that may not have access to a land line or computer for e-mails

Personal Thank You's Delivered By Someone Besides You

I put personal Thank You's, Gifts and Promotional Items delivered by someone else under "secondary tools" rather than under "other tools" because when someone sincerely delivers a "Thank You" it leaves a lasting impression. If you can't deliver, have someone else deliver the "Thank You". One of the most powerful ways of personally saying Thank You is to deliver or send a unique gift to a client or potential client. There is a good reason for you saying, "Thank You" with a gift, especially with people who are not yet clients.

Personal Thank You's that are done by fax, phone, E-Mail, letter delivered by courier and delivered by someone else that are a specific personal message fit under Secondary Tools.

Think about how many times you have personally received a personal Thank You from someone in the past year. I am sure the list is quite short even though you have been a customer or client to many companies and people. You have also gone out of your way to help friends, relatives and associates. How many cards, letters, faxes, phone calls or gifts of thank you have you received?

The one's you received, you remember, because they were an exception, not the norm.

Set up your own strategies and thank you tactics with your clients, friends, family and associates. It pays ten fold.

Mass produced corporate "thank you's" are not nearly as effective as personal Thank You's.

Before moving on to other tools, reflect on what kind of impact you would have on present or potential clients, if you were to add these secondary tools to your contact strategy of primary tools. Not only is the client or potential client receiving contact from you through personal calls, lunches and dinners, functions, events, coincidental encounters and telephone calls, he or she is in addition receiving contact from your personal assistant, support people, service people, getting faxes from you, plus thank you's and gifts. Look at the difference if your competitor is only making the odd sales call.

Step 5: Other Tools

The data base selling tools that we are now going to look at, are the one's that are usually utilized through direct mail programs which are often termed Data Base Marketing.

It is much easier to reach a large base of clients or potential clients with the other tools than it is with the secondary and primary tools, because the other tools require less time per client.

All of these tools are more effective if you take the time to personalize them by specifically picking individual tools that relate to the client or potential client. Also a personal note written on the tool or "highlighting" certain things, shows you really value them as individuals.

Congratulations

If you have narrowed down your key account data base of clients to a manageable number, it is not difficult to actually set up a system to look for, and find reasons to congratulate people, their companies and their families.

One could identify 20 clients or potential clients and give your team-mates; family, friends, sales manager and support people a list of these 20 clients. Now, tell them these clients and their companies are very important to you. Then ask them to keep their eyes and ears open and if they see any reason for you to justify sending a congratulation, then please to let you know. You could even tie it into an incentive for the tip off.

Here are a few reasons for sending congratulations:

- Company or individual won an award.
- They had a nice write-up in a newspaper, magazine, etc.
- They graduated from a night school or class or finally got their MBA, etc.
- One of his or her children graduated, received an award or achieved a feat in sports.
- One of their staff members achieved something great.
- The person was just elected to a board of a company or an association.
- The person got a promotion.
- The company earned an ISO listing.
- A new addition to the family or their children's family.

- Opening of a new division .
- Record profits in the year.

Greeting Cards

Christmas Cards, Sympathy Cards, Easter Cards, Birthday Cards and Anniversary Cards are examples of greeting cards.

Greeting cards work better if you have already established some form of relationship. A greeting card from someone you do not know has very little impact.

If you were to pick the card specifically for that person or company and made sure it related to them and your relationship with them, the greeting card would have more success for you.

With today's technology you could design your own. Consider faxing the card to the client, especially if you created it specifically for the client.

Poems and verses with the client's name in them, pictures of the client, their business etc. tied into the card, are only a few of the ways you can personalize the greeting card.

An associate of mine had a very close friend who sold life insurance to her. On her birthday she received a birthday card in the mail sent by her friend's secretary, with the life insurance salesman's name stamped on the card instead of his signature. She immediately cancelled the life insurance and the friendship. There was no contact from him after she cancelled the insurance. A few years later he coincidentally met her in a restaurant and still did not ask her why she had cancelled.

Sending out greeting cards in a robotic, impersonal fashion, can often cause more harm than good.

Postcards

Postcards work well with those clients and potential clients you have built up a relationship with through personal contact. Again the message on the card should relate to the client, you and the relationship. Select a postcard that ties in with the clients' interests, etc.

Newsletters, Invitations

This could be sending the prospect or client your personal or corporate newsletter or it could be sending invitations.

Articles Written By You

If you write a regular article for a magazine, journal, newsletter or newspaper always get overprints run off so you can send them to your key clients. A personally written note on the top, a special part highlighted, etc. will obtain you a nice favourable response.

If you do not write for some form of media you can write a one or two page article on a subject that would interest your client base, have it set up by a professional or on your personal computer with your picture and name as the writer, and then mail it or fax it to your clients or potential clients.

Endorsement Letters

Several years ago I had Brian Small, the General Manager of the Greater Victoria Chamber of Commerce send a letter of endorsement and letter of introduction about me and my services across Canada to the 100 members of the Chamber of Commerce Executives of Canada. At that time Brian was the Vice President of that association. I received 40 speaking engagements from 100 Chamber of Commerce and Boards of Trade.

In the speaking industry, it is wise to keep sending Speaker Bureaus new updated endorsements. If you sell to clients from several industries and you receive a great letter from one of the businesses in one of those industries it would be wise to forward that letter to potential clients in that industry. It adds credibility. The only caution is where they may not feel comfortable if you have dealt with a competitor.

The power of endorsements is that in them, someone else is talking about you. Another form of this is when you have had a great article written about you. You could turn it into a marketing piece or utilize a paragraph or two in a direct mail piece. Endorsement letters can be about your products and services too.

Endorsement Quotes

This is where you have several sheets of quotations from different people about you, your services, products and/or company. It can be a "by the way" note to verify other client's satisfaction, especially a few days after a meeting.

Client Information Updates, Needs, Desires, Preference Requests

This is the sending of response forms to gather information to update files or to determine how to better serve the customers.

Items of Interest and Hobby Information

This is knowing the clients interests and hobbies and sending information with that focus.

Clippings - Success Stories, etc.

This is where you clip and/or Photostat stories of interest that relate to the client and his/her business. These can come from newspapers, books, magazines, newsletters and research documents.

How To's / Helpful Hints

One of my favourite sayings is "You never have to knock the competition if you thoroughly educate your customers on your products and services, your industry and how to buy properly. If the competition doesn't offer its services or sell in the proper way the client will recognize it and the competitors then knock themselves."

Clients and potential clients appreciate receiving How To's and Helpful Hints that can help them personally and corporately. If your material is really helpful your clients or potential clients will always look forward to hearing from you.

I usually tell them to call or write for permission to re-print. Many people call and are grateful that they are given permission at no charge.

You can also send out a videotape, audiotape, computer disc or ask them to log on to your web page through the internet for helpful How To's.

News Release

there will be times that you may receive a **news release** from an association or individual that may be of interest to specific clients. it would be wise to send a copy to your clients.

Industry Announcement

Special announcements by your industry, association, your company about the industry or your client's industry, special research, etc. is also the kind of information clients appreciate receiving. Once again make sure it would be of interest to your client. Clients get inundated with information and do not have time to edit the overload. You can act as an editor by sending only pertinent information.

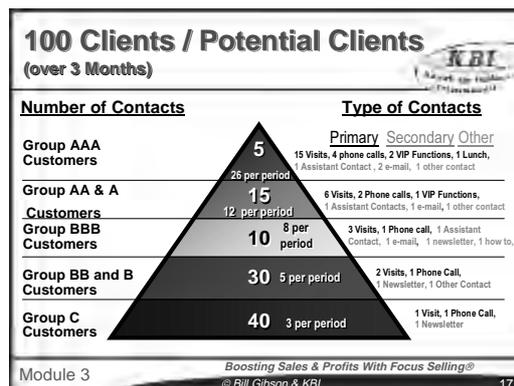
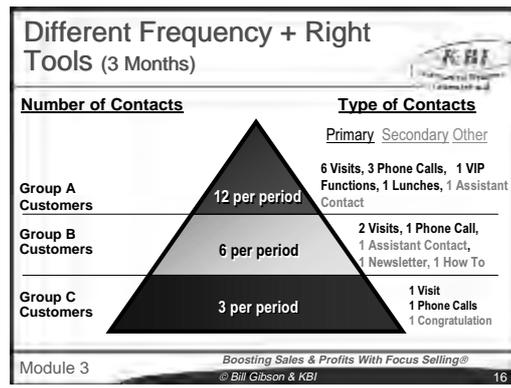
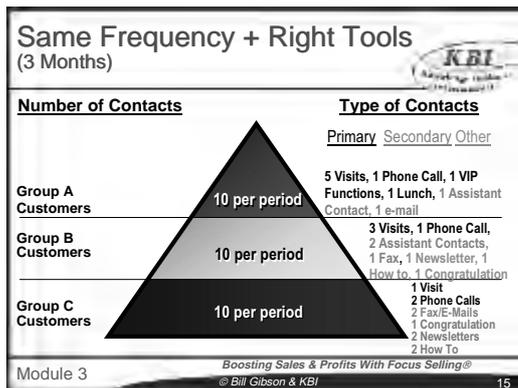
Specific Offers and Information Matching Their Needs

This is really knowing the client Specific needs and desires and then sending specific offers or information that matches the needs and desires.

Remember: The success principles behind Data Base Selling is the **Frequency** of contact and the fact that you **Be Seen** as much as possible by the client.

Graphic Examples of Frequency With A Client Base

The following three slides give you an example of how one could plan a Frequency of Contact Program with the Primary, Secondary and Other Tools of Data Base Selling.



Setting Up A Frequency Program On Your Data Base

Once You've done your ABC Segmentation work, that you were introduced to in Module 2 you would have all your clients and prospects categorised under A, B, C in the Retain, Develop, Regain and Gain Columns.

What you then do is decide what kind of Frequency you'd like to achieve with your clients and prospects over a certain period of time. You could do this deciding the frequency of Primary Tools, Secondary Tools and other Tools over a given time period under each of the categories of Retain, Develop, Regain and Gain. The following diagrams can be utilized as an example or process

Exercise: Utilising a copy of the above diagrams set some frequency goals with your client and prospect base.

Most Wanted Approach

WANTED



Dead or Alive

Important Data

◆	◆
◆	◆
◆	◆
◆	◆
◆	◆
◆	◆
◆	◆
◆	◆
◆	◆

When I managed radio advertising sales forces, we used to identify three potential clients or light user clients per salesperson that had the capacity to invest \$50 000 per year in advertising with us. We called these potential big advertisers our “most wanted.”

Then we would have a special meeting where each salesperson showed up with their own Wanted Dead or Alive Posters of their clients loaded with pertinent information. We would poster the walls and then we would have a fun contest and give awards for the top 5 with the most pertinent information and the top 5 most creative.

These clients then became the most wanted hit list, for each salesperson, and for the entire station.

On these potential and present accounts everyone in the radio station was made aware that these names were on the Most Wanted List.

Immediately all 21 potential big advertisers (7 salespeople x 3 names each) went on our VIP list. They would be treated as if they were already major advertisers. The following would happen:

Right Frequency with the Right Tools – 3 Months (Clients / Prospects)

CATEGORY	USERS		NON-USERS	
	RETAIN	DEVELOP	REGAIN	GAIN
A Primary				
Secondary/Other				
B Primary				
Secondary/Other				
C Primary				
Secondary/Other				

High Yield & Larger Investment (top), Lower Yield & Smaller Investment (bottom), Pro-Active & High Relationship Selling (right), Passive & Lower Relationship Selling (left)

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Right Frequency with the Right Tools – 3 Months (Clients / Prospects)

CATEGORY	USERS		NON-USERS	
	RETAIN	DEVELOP	REGAIN	GAIN
A Primary	4	4	4	6
Secondary/Other	4	4	4	4
B Primary	2	2	2	3
Secondary/Other	2	2	2	2
C Primary	1	1	1	1
Secondary/Other	2	2	2	2

High Yield & Larger Investment (top), Lower Yield & Smaller Investment (bottom), Pro-Active & High Relationship Selling (right), Passive & Lower Relationship Selling (left)

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Right Frequency with the Right Tools – 3 Months (Referral Source)

CATEGORY	USERS		NON-USERS	
	RETAIN	DEVELOP	REGAIN	GAIN
A Primary				
Secondary/Other				
B Primary				
Secondary/Other				
C Primary				
Secondary/Other				

High Yield & Larger Investment (top), Lower Yield & Smaller Investment (bottom), Pro-Active & High Relationship Selling (right), Passive & Lower Relationship Selling (left)

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Right Frequency with the Right Tools – 3 Months (Referral Source)

CATEGORY	USERS		NON-USERS	
	RETAIN	DEVELOP	REGAIN	GAIN
A Primary	4	4	4	6
Secondary/Other	4	4	4	4
B Primary	2	2	2	2
Secondary/Other	2	2	2	2
C Primary	1	1	1	1
Secondary/Other	2	2	2	2

High Yield & Larger Investment (top), Lower Yield & Smaller Investment (bottom), Pro-Active & High Relationship Selling (right), Passive & Lower Relationship Selling (left)

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- Each one of the Most Wanted would regularly receive the free give-aways we would normally give major advertisers.
- They would be invited to all our special functions for major advertisers.
- They would be invited to a special lunch with the General Manager, The Sales Manager and The Sales Representative. Senior Management usually set the appointment.
- Spearheaded by Senior Management, an appointment would be set for the salesperson to complete an in-depth marketing questionnaire on the business.
- An extensive presentation and advertising and marketing proposal would be put together, including a series of commercials (at no charge) executed in advance.
- The client would be invited to the radio station for a full presentation, but before the presentation was made they would be given a full tour of the facilities, meeting all the personalities and receiving gifts.
- The presentation would be made by the salesperson accompanied by the Sales Manager and/or the General Manager.

During this period of courtship, staff at the station would be encouraged to shop with the “most wanted” and identify where they were from.

Top radio personalities were also tied in, where appropriate, as special spokespeople on behalf of the client. This was arranged for a monthly fee to that personality.

The Most Wanted also went on our regular data base marketing list and received information that was of real use monthly and sometimes weekly.

With the combination of sales calls, lunches, dinners, invitations to special functions and events, coincidental encounters, telephone calls, special attention from management and support staff plus the data base marketing thrust, over 80% of these potential clients would be big advertisers by the end of the year.

Most Valued, Most Potential / Most Wanted Program.

The Most Valued, Most Potential, Most Wanted Program is the fastest, most efficient and most impactful way to see results with Data Base Selling. It is modelled after the original Most Wanted process I used in Radio Advertising Sales.

Through utilizing criteria, each salesperson picks for example, 3 Most Valued Clients and 3 Most Wanted / Most Potential Clients or Prospects and agree to a certain number of activities with each of them over a given period of time. Then the various levels of management and support people support that salesperson with a Client Contact Program, as well.

The following slides indicate what the activities could look like with these people.

Example

Multi-level, Multi-contact
approach to
Most Valued
Most Potential / Most Wanted

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Sample

Salesperson - Actions with the 3 "Most Valued" clients

- Needs analysis - do this within 30 days and do an update every 6 months
- Personal visit - minimum twice per month
- Partnership meeting - within 60 days and do it twice annually
- Lunch / dinner / breakfast - twice annually
- Event / function - twice annually
- Gift / promo item - twice annually
- Intro to "useful contact" - once annually

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Sample

Sales Manager / General Manager - actions with the 3 "Most Valued" of each Salesperson

- Needs analysis - accompany the salesperson once a year with each of the 3 most valued
- Personal visit - once every 6 months
- Partnership meeting - once annually
- Lunch / dinner / breakfast - once annually
- Event / function - once annually with 2 of the 3 "Most Valued"

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Sample

Senior Executive - actions with the 3 "Most Valued" of each Salesperson

- Personal phone meeting - 2 of the 3 most valued - once per year
- Personal letter of thanks - all 3 once per year
- Personal visit - 1 of the 3 most valued - once per year

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Sample

Salesperson - actions with the 3 "Most Wanted / Most Potential"

- Needs analysis - within 60 days and an update once per year
- Personal visit - twice per month for 3 months and once a month thereafter
- Team visit or partnership meeting - within 30 days and then once a year
- Lunch / dinner / breakfast - once annually
- Event function - twice annually
- Gift promo item - twice annually
- Intro to "Useful Contact" - once annually

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Sample

Sales Manager / General Manager - actions with 3 "Most Wanted / Most Potential" of each Salesperson

- Personal visit - once within 90 days then once every 6 months
- Team visit - once per year
- Lunch / dinner / breakfast - once annually with 2 of the 3
- Event / function - once annually with 1 of the 3

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Sample

Senior Executive - actions with the 3 "Most Wanted / Most Potential" of each Salesperson

- Personal phone meeting - 1 of the 3 most wanted / potential
- Personal letter of invite to do business or do more business - all of the most wanted / most potential

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**Most Valued, Most Potential,
Most Wanted Referral Sources**

"Put together a similar strategy for your most valued, most potential, most wanted referral sources and/or important contacts within key accounts and major corporations!!"

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Focusing On The Right Clients/Prospect With The Right Frequency With The Right Data Base Selling Tools Works

The Data Base Selling Process Works especially combined with targeting the Right Clients and the Right Prospects and the Right Referral Sources. Add in The Most Valued/ Wanted/Potential process and you'll get real results. The results in the two slides below came from clients that diligently worked the process.

Frequency Marketing Works



1. In July the George team performed above target by 181% and in August by an incredible 204%. The PE Team has increased the pipeline from R12 –15 million to R40 million. Year on Year production for the region increase is 56%.
Nico van der Westhuizen
Regional Manager, Commercial Sales
ABSA Vehicle & Asset Finance
Western & Eastern Cape, Nov / 2003
2. 85% increase in sales Year on Year
David Drummond
Managing Director, Acer Africa (Pty)Ltd
Feb / 2004

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Frequency Marketing Works



3. Oct 2003 to December 2003
Direct Billings up by 300% over the Previous Quarter (Part of the United Stations Group at the time)
Ricky Singh
Sales & Marketing Manager
P4 99.5 FM
28 Jan 2004
4. Controlled Group of 113 Financial Advisers
April 2003 –J uly 2003
Group 1 over Group 3 = 600% up
Jannie Roussouw
Sanlam / Nexus
Sept / 2003

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Action is the Key!

Your Most Valued/Most Wanted/Most Potential Plan

Select a certain number of Most Valued (Retain-A), Most Potential (Develop-A) and Most Wanted (Regain or Gain A) clients and utilise Worksheet #1, 2, and 3 and implement your own program. Keep the number of client's prospects and referral source low. You will continue to work your regular client base, but these special prospects, clients and referral sources will get special attention.



Worksheet 1 ANNUAL Action Sheet

Type: Potential Client Client Referral Source

Category: Most Wanted Most Potential Growth Most Valued

Name: _____ **Date:** _____

Period: **From:** _____

To: _____

Account Executive: _____ **Location:** _____

Implementer: _____

Location: _____

Title/Position: _____

Planned Actions / Strategies / Tactics	Targeted Dates:



Worksheet 2 Monthly Action Sheet

Type: Potential Client Client Referral Source

Category: Most Wanted Most Potential Growth Most Valued

Name: _____ **Date:** _____

Period: **From:** _____

To: _____

Account Executive: _____ **Location:** _____

Implementer: _____

Location: _____

Title/Position: _____

Planned Actions / Strategies / Tactics What? When? How? Who? With?	Results (Plans completed / Sales / Future)

Boosting Sales & Profits With Focus Selling



Worksheet 3

Information Resource Form – Most Wanted / Most Potential / Most Valued

A.E.:	Office:	S.M.:	M.D.:	Page _____ of _____		
Target Date:	Date sent to:	S.M.:	M.D.:			
Special Focus Category	Name	Postal Address	Physical Address	Phone Business, Residence, Cell	Fax, Email, Other	Additional Useful Information
<input type="checkbox"/> Client <input type="checkbox"/> Ref. Source <input type="checkbox"/> Most Wanted <input type="checkbox"/> Most Potential <input type="checkbox"/> Most Valued				B: R: C:	F: E: O:	
<input type="checkbox"/> Client <input type="checkbox"/> Ref. Source <input type="checkbox"/> Most Wanted <input type="checkbox"/> Most Potential <input type="checkbox"/> Most Valued				B: R: C:	F: E: O:	
<input type="checkbox"/> Client <input type="checkbox"/> Ref. Source <input type="checkbox"/> Most Wanted <input type="checkbox"/> Most Potential <input type="checkbox"/> Most Valued				B: R: C:	F: E: O:	
<input type="checkbox"/> Client <input type="checkbox"/> Ref. Source <input type="checkbox"/> Most Wanted <input type="checkbox"/> Most Potential <input type="checkbox"/> Most Valued				B: R: C:	F: E: O:	
<input type="checkbox"/> Client <input type="checkbox"/> Ref. Source <input type="checkbox"/> Most Wanted <input type="checkbox"/> Most Potential <input type="checkbox"/> Most Valued				B: R: C:	F: E: O:	

Module 4

Building Client Rapport

Learning And Sales Development Outcomes

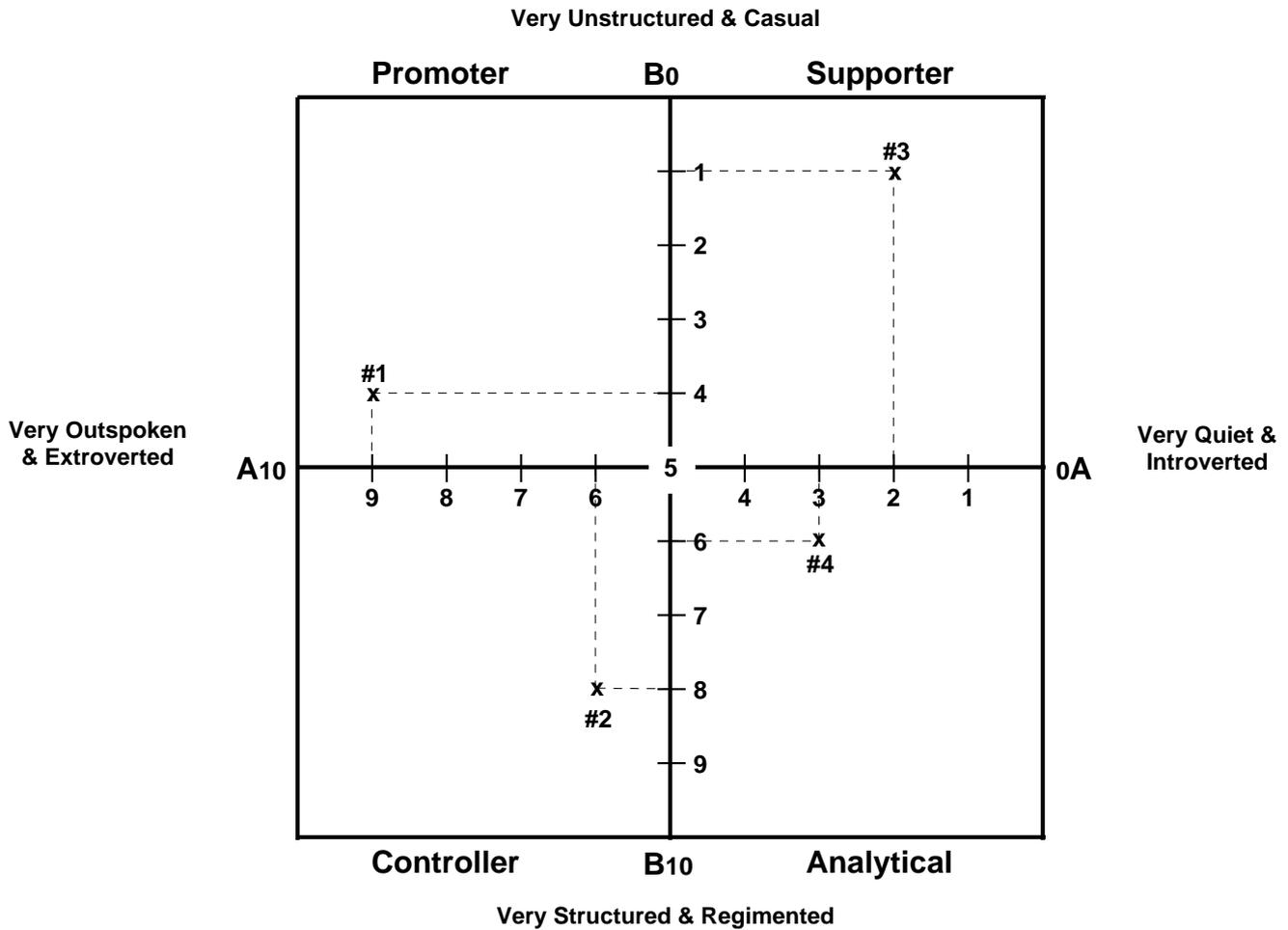
In this module you will:

1. Learn more about your own Personality Style and how you act or react under certain circumstances.
2. Learn more about how to effectively “sell to” or “influence” others by understanding their Personality Style.
3. Complete an exercise so you can effectively use The Quick Read Tool.
4. Learn more about Building Bridges when communicating to Build Rapport with others.

***Ntsika Enterprise Promotion Agency,
with a focus of rendering non-financial support to SMME's
is part of The Department of Trade and Industry in South Africa.
Ntsika, along with the support of The European Union
assisted in the Initial Development of the
Boosting Sales & Profits With Focus Selling program
in conjunction with Knowledge Brokers International Limited.***



The information on the previous page was transferred to the lines A and B below.



Line A:

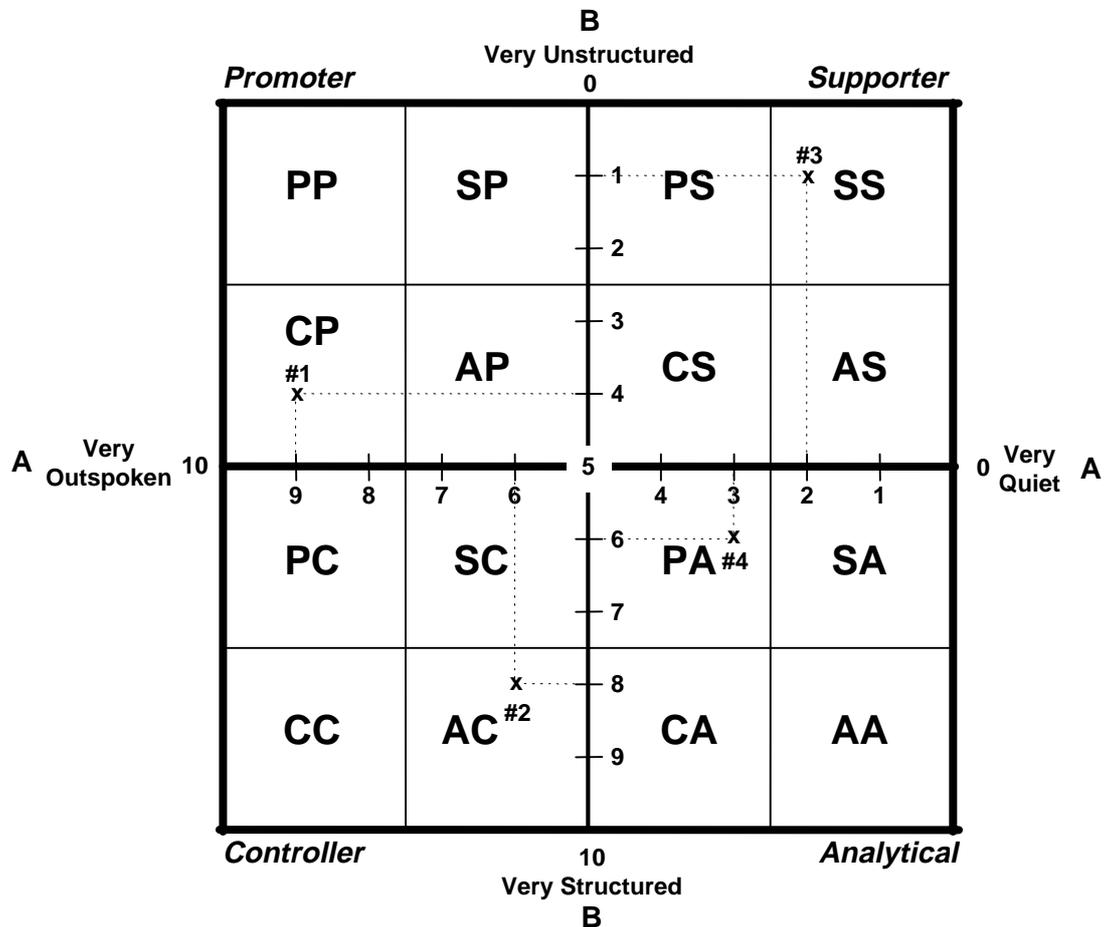
- Person 1 has landed in the Promoter Quadrant
- Person 2 has landed in the Controller Quadrant
- Person 3 has landed in the Supporter Quadrant
- Person 4 has landed in the Analytical Quadrant

Line B:

- The dominant style of Person 1 is the "promoter" style.
- The dominant style of Person 2 is the "controller" style.
- The dominant style of Person 3 is the "supporter" style.
- The dominant style of Person 4 is the "analytical style".



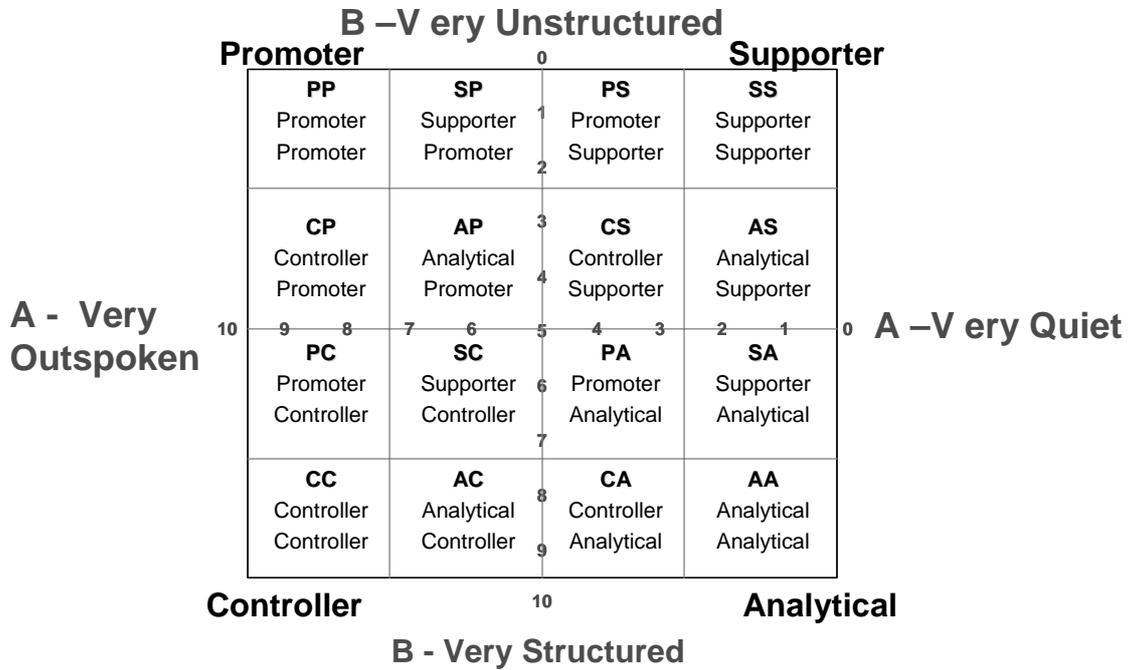
The personal assessment points were transferred to the appropriate quadrant below. You will notice each of the quadrants is divided into four sections and in three of the four fictitious examples there are two sets of personality characteristics available. #1 is a Controller Promoter, #2 is an Analytical Controller, and #4 is a Promoter Analytical. #3 is mainly one set of Characteristics. #3 is a Supporter Supporter.



- Person #1 ended up as a Controller Promoter (CP)
 Dominant in "Promoter" characteristics
 Secondary characteristics are "Controller"
- Person #2 ended up as an Analytical Controller (AC)
 Dominant in "Controller" characteristics
 Secondary characteristics are "Analytical"
- Person #3 ended up as a Supporter Supporter (SS)
 Dominant in "Supporter" characteristics
 (No secondary characteristics)
- Person #4 ended up as a Promoter Analytical (PA)
 Dominant in "Analytical" characteristics
 Secondary characteristics are "Promoter"



Quick Read Tool



Who Fitted Where? (Description of each section of each quadrant)

Example Person

Promoter Quadrant

- PP Dominant in “Promoter” characteristics
- SP Dominant in “Promoter” characteristics
Secondary characteristics are “Supporter”
- AP Dominant in “Promoter” characteristics
Secondary characteristics are Analytical

Person 1 (CP)

- CP Dominant in “Promoter” characteristics
Secondary characteristics are “Controller”

Controller Quadrant

- CC Dominant in “Controller” characteristics
- PC Dominant in “Controller” characteristics
Secondary characteristics are “Promoter”
- SC Dominant in “Controller” characteristics
Secondary characteristics are “Supporter”
- AC Dominant in “Controller” characteristics
Secondary characteristics are Analytical

Person 2 (AC)



Analytical Quadrant

- AA Dominant in Analytical characteristics
- CA Dominant in Analytical characteristics
Secondary characteristics are "Controller"
- PA Dominant in Analytical characteristics
Secondary characteristics are "Promoter"
- SA Dominant in Analytical characteristics
Secondary characteristics are "Supporter"

Person 4 (PA)

Supporter Quadrant

- SS Dominant in "Supporter" characteristics
- PS Dominant in "Supporter" characteristics
Secondary characteristics are "Promoter"
- CS Dominant in "Supporter" characteristics
Secondary characteristics are "Controller"
- AS Dominant in "Supporter" characteristics
Secondary characteristics are Analytical

Person 3 (SS)

The Supporter

Sensitive

The supporter is the sensitive one within the four quadrants. He can easily be hurt by others, and is usually sensitive to the situations of others.

Lacks Structure

Through her sensitivity and usually high humanitarian interests, structure is not a priority. She can operate in an arena of very little structure and not even notice the lack of rules, regulations, goals and objectives.

Relationship is Number One

Relationship and the feelings of individuals must be spared at all costs. This is usually the approach of the helper.

Loves to Help Others

This person truly enjoys helping others and invests a lot of time doing just that. Often it is done without remuneration.

Persuade

This individual is not likely to be found working on commission. Guarantees and Assurances are great persuaders with him.

Specialty

With all the above qualities her natural specialty is to be supportive to other individuals. She does well in a supportive role.

Downfall

With such a high level of sensitivity and need to help others he can be taken advantage of by others. He could give the ship away.

Back-up Style

Under pressure the Supporter will "go along" with the situation or "fit in" to avoid conflict. She is not likely to be autocratic.

Selling To The Supporter

- Be Sensitive - Respect his space and do not be too loud. Tone of voice matters. Be aware of the Supporter's feelings.
- Ask for her support. She likes to be of help.
- Show trust in him.
- Do not box her in. Give her room.
- Use a comfortable easy approach.
- Take time to find things that you have in common. Build a relationship.
- Be helpful.
- Take your time. Do not rush him.
- Loved ones and friends are her life. Show respect for her loved ones and friends.
- Be sincere and show and talk about your feelings.
- Do not ask him to take risks.
- Slowly move her to a point of acceptance.
- Show your concern for humanity.
- Console where appropriate and listen.

The Analytical Person

Provide Details

This person is detail oriented. He likes to see the "fine print" and the "specific details".

Facts and Data

Dreams and flashy stories do not usually move this person. Research that delivers the facts and data impresses her more.

Save Face

The Analytical Person is not likely to stick his neck out or speak before he has analysed what he is going to say.

Lack Spontaneity

With the focus being so strong on facts, data and details, this person can get very comfortable in her environment and takes very few risks. This often results in lack of spontaneity. She feels comfortable with structure.

Persuade

Use facts, data and details to persuade. Also, be sensitive enough to support his principles and thinking. Remember, there is a lack of spontaneity here and he may not be impressed by opposing principles and thinking.

Specialty

Her real specialty is accuracy. She is an excellent person to back-up others with the needed accurate details. This person is usually found in professions like teaching, accounting, law, medicine and engineering.

Downfall

With a real need to save face, not make mistakes, and have all the facts, it could take him a long time to make a decision.

Back-up Style

The Analytical Person would rather avoid a pressure situation than confront it. Sometimes she will not express her true opinion even when asked. If she thinks you are pressuring her to buy she will disappear, at least mentally.

Selling To The Analytical Person

- Cover the fine points with the Analytical Person.
- Be specific and provide details.
- Do your research, he wants you to know what you are talking about.
- When presenting utilise data, facts, graphs, charts, reports.
- Be accurate.
- Deliver quality, she looks at things closely.
- Talk savings and security.
- Acknowledge and try and work within his principles and thinking.
- Ask for her input.
- Don't be pushy or too flashy.
- Saving face is important so do not embarrass him.
- Respect his space. Do not get too close.
- Be friendly but do not overstep her boundaries.
- Do not touch.
- When he is talking do not interrupt. Remember he lacks spontaneity.
- Do not change direction once you have agreed.
- Respect her schedule.

The Controller

Loves Results

This personality type is impressed with results. She often feels that "talk is cheap", and what is accomplished is what is important. Talk results and show results to her.

Decision Makers

The Controller likes to be the one making the decisions not the one that is relying on the decisions of others.

Save Time

Do not waste a Controller's time. He is not the type to sit around and waste time talking about the weather.

Like to be in Charge

This person likes to control and be in charge. She is not easily controlled by salespeople.

Persuade

To persuade the Controller, consider the following:

1. Because he likes to make decisions, and be in control, provide him with options.
2. When talking about what may happen, futuristically lay-out the probabilities. Sometimes she takes offence to someone telling her the exact way things will turn out or "this is definitely the only way to do it".
3. When he comes up with conclusions or specific actions show support.

Specialty

Action now. She is a real doer.

Downfall

He has two main areas of downfall:

1. Insensitive - anyone who loves results now, wants to make the decision, save time and be in control will not **normally** possess the sensitivity of someone like a supporter. He will have to work at being sensitive.
2. Need to be right - this person loves winning and will argue to prove she is right even when she is wrong.

Back-up Style

Under pressure this person is autocratic. In other words it is either my way or the highway. You will often hear him say, "if you will not do it, I will get someone else to", or "if you are not going to do it, get out of the way, I will do it".

Selling To The Controller

- Talk results and show results.
- Keep profits in mind and in your discussions.
- Be concise and get to the point.
- Be clear.
- Do not waste her time.
- Give him the bottom line of a situation quickly.
- Always give options. She likes to be the decision maker.
- Outline the probabilities so he can see where things are going.
- Show your ability to move to action.
- Stick to business.
- Don't be too chatty.
- Do not try to control her.
- Use logic.
- Summarise.
- Hit the highlights, he will get the picture.
- Do not argue.
- Use a strong direct posture. She appreciates strength and back bone.
- Do not get too personal.

The Promoter

Applause

This person requires more positive feedback than the other three styles. She easily gains and accepts the centre of attention in a group with her outgoing stroke seeking personality.

Best Starter

The old saying, "the easiest person in the world to sell to is a salesperson", fits extremely well with the Promoter. This person gets excited quickly and is usually a fast starter.

Save Effort

The Promoter looks for ways to save effort. Systems, electronics, duplicating, things that can save effort appeals to him. This type of person may often become an inventor.

Dreams and Intuitions

This person is not usually data and facts oriented. She is governed by her dreams and hunches. She can easily paint a picture with her mind and the minds of others. She would be inclined to buy the sizzle rather than the steak.

Persuasion

This person is influenced by testimonies and incentives. What the Jones family did will make a difference if they have credibility.

Specialty

His specialty is being expressive.

Downfall

It is common for the Promoter to **think out loud**. So, in other words, the tongue can go into action before the brain stops. The Promoter will often commit to something quickly **and** then want to back out. Also, his expressive nature tends to make him into an individual that goes from one thing to another resulting in lack of focus. It is easy to distract the Promoter.

Back-up Style

Under pressure this individual will usually resort to attacking as a defence system. This relates back to the need for applause. Justification through attack is common for those who do not like criticism.

Selling To The Promoter

- Exude energy and fun when dealing with the Promoter.
- Give him compliments.
- Visually show your response.
- Be personal.
- Be willing to listen to her while she takes time to expand a concept.
- Appropriate contact is okay.
- He appreciates a quick mind - be witty.
- Show flexibility. She does not like rigidity.
- Do not talk down to him - talk to him or with him.
- Handle the details for her.
- Show him how to save effort.
- Make her look good.
- Do not criticise or he will attack.
- Show her the positive impact she has on you.
- Give him the opportunity to be:
 - The first in
 - The pace setter
 - Ahead of the pack
- Carefully keep her focused.

Important: We all possess some of the characteristics of all four styles but we are usually more dominant in one or two of them. The Quick Read Tool is only a tool to help you better understand and deal with others. You cannot “pigeon hole” someone and say that is exactly who they are based on such a simple exercise. There are many factors that make up an individual. Generally speaking, you will see that it is a good guide. As a salesperson you can use the tool by asking close associates, PA’s and staff members to give you the numbers from 0 - 10 on the A and B lines on those you are going to meet or present to. This can be done in advance to help you prepare for the meeting. The profession someone is in can give some guidance as to someone’s possible style. So can their clothes, car and their office.

Building Bridges When Building Rapport

It is important to Build Bridges with others rather than Building Blockades when communicating and building rapport with others.

The following 6 skills can help you Build Bridges with your prospects and clients as well as other people in your business and personal life. The 6 skills are as follows:

Drop The Traditional Roles

One of the steps to developing a magnetic personal presence, is to drop our traditional roles and go for the goal. Our goal, which is to establish rapport effectively, can only happen when the parties we are communicating with, feel totally wanted, and comfortable in our presence.

Let’s take a look at Themba. Themba is the assistant to the Managing Director of a major multi-national corporation. The two of them have developed an incredible working relationship over the past few years. They understand each other’s values, morals, beliefs and can communicate effectively with each other. They even head out to the Golf Club together once in a while. These two are great friends and have rapport with each other consistently.

Unfortunately some people in other departments are complaining about Themba to the Managing Director. He has not been giving the MD the messages left by these people, and often plays favourites with some of his subordinates.

No problem, right? The MD and Themba are good friends, the MD will just take him to lunch, talk it over just like a couple of old friends. Right? WRONG!

At 9am, the MD sees Themba in the hallway. The MD then undergoes a transformation from who he is, to his “role”. This is where he becomes the authoritarian manager ready to reprimand the underling. His chest puffs out, “Themba please step into my office.” At this point Themba is already on the defence, all channels of effective communication severed with the loss of rapport. Themba is uncomfortable with the MD’s role, after all they are friends. Then the MD may say something like, “Sit down, relax.” Good luck! The MD, through his role as an authoritarian manager reprimanding an underling, has immediately put the two of them in adversarial roles. For effective problem solving to occur in this environment a miracle would have to occur.

This type of activity dissolves rapport instantly and severs our channels of communication. It happens in a variety of areas in the business world. Some people put on the important sales executive role and talk down to a secretary who would have booked an appointment with a key account for them. Often technicians or people with in depth knowledge in their field such as computer network programmers or financial advisors will talk over the heads of their clients while playing the “brilliant consultant” role. In the mean time, they lose their client to someone who related to the client on a more personal level. People do not care who you are, or how much you know, until they know how much you care about them.

If a salesperson meets someone who does not like salespeople, or a banker is meeting with a client who obviously feels uncomfortable with the banker, the banker has to abandon his traditional role. Become a connoisseur of cigars with the client if you share that interest, forget about being a salesperson. The sale will happen when you create a friendly environment where an act of faith can take place. The banker could become a problem solver. Instead of asking, “What did you want from us?” how about, “How can I help you achieve the level of financial stability you are looking for?”

It is much more important to make people feel totally wanted and comfortable in your presence than for them to be aware of your role. At this point you have only begun to speak the language of rapport; the next piece of the puzzle is the all important art and science of non-verbal communications.

Monitor Your Body Language

How important is non-verbal communication to building rapport? It is 93% of effective communication in building and delivering a presentation creating desire and a compelling reason for people to move to action with you. You are only 7% effective if you do not understand the power of communication beyond just using words. A study developed by founders Richard Bandler and John Grinder of NeuroLinguistic Programming in the early 80’s turned up some astonishing figures. This study cited the make up, or proportions of importance, in total communications.

The figures on the Effectiveness in the Breakdown of One-To-One Communications was as follows:

- 7% is in the words
- 23% is in the Tone of Voice
- 35% is in the Facial Expression
- 35% is in the Body Language

Monitoring your body language is really what we are suggesting. Be aware of what you are doing and be prepared to adjust with the client. Observe yourself especially if someone makes you feel uncomfortable or confronts you. What is your body saying?

Match / Mirror / Pace

As stated at the beginning of this program our goal in establishing rapport should be to appear as a mirror image of the person we are communicating with. This mirror image does two things. It makes the person say "This person knows how I feel, they can see where I am coming from, they are a lot like me." The second thing mirroring does is to put the person in a position of rapport where they want to agree with you verbally and/or non-verbally.

By now you are probably asking what exactly is mirroring and how does it work? We all know at least one very dynamic expressive type of person. Have you ever noticed that when they communicate with an Italian, they pick-up an Italian accent? If someone gets excited this person gets excited along with them. What this expressive is doing, is creating a harmonious state of communicating, where they are communicating with the other person in the same fashion that person is communicating with them. We process and accept information most effectively when we receive it in the same way as we would communicate it.

When we looked at personality styles we looked at how analyticals communicate in a very careful, conservative, cautious manner. It makes sense that if we want to influence them and gain rapport with them we should communicate with them in a careful, conservative, cautious manner.

But let's consider this in more depth. Our subconscious mind is constantly analysing sensory data that we are receiving. Non-verbal communication gains rapport on a deep subconscious level, before we even begin to pass judgement on the validity of verbal communication. In short, if our subconscious senses that someone we are communicating with talks the same way as we do, the message to us is that "This person is trustworthy, they are like us!" Most of the time when we immediately feel comfortable with someone we cannot quite figure it out. It is usually because non-verbally they are a lot like us, and that based upon their appearance, style of speech, gestures and expressions we feel comfortable in their presence.

Following is a list of areas where we can mirror people in order to gain total rapport non-verbally:

- Eye Movements
- Gestures and Posture
- Breathing Rates
- Tonality and flow of language

Eye movements are easy to mirror. If a person is constantly glancing in a certain direction after making a point, mirror that movement. Subconsciously they will recognise that you feel the same way.

Gestures and Posture play a major role in mirroring. One important issue to be aware of is never to mimic someone else's body movements. It will become obvious and the person may feel ridiculed or insulted. A more effective method is to mirror the other person by using similar body posture, or use identical posture, but delay it by a couple of minutes. The delay is possible because our subconscious identifies similar postures over several minutes and not just by what is happening now.

Areas of focus when mirroring can be on the angle of the head, specific hand gestures or fidgeting, arm positioning, how they are sitting, the way they are leaning or a thousand other positions. By appearing as a posture and gesture mirror of the person you are communicating with, they will feel in harmony or in rapport with you.

Breathing rates have two specific areas you need to concentrate on when matching, mirroring and pacing others. The first being location, and the second being rhythm. There are three primary locations a person breathes from. The first one is where they breathe from their throat, and there is not a highly visible expansion or contracting of the rib cage or diaphragm. The second position is where there is a noticeable movement of the mid-upper chest area. The last problem is deep diaphragmatic breathing where the belly is being visually distended. Mirroring the rate and location of breathing is a subtle and effective way of communicating non-verbally with the person you are gaining rapport with. Try it in your personal relationships!

Tonality and Flow of Language is a crucial area to focus on when mirroring. Some people are loud, brash communicators, others are quiet and high pitched. Some people talk fast, others seem to enjoy taking their time. If you want your message to be received well by the individual with whom you are conversing, mirror their tonality and flow. People relate to the tonality and the flow of language that they are presently using.

The next question is; how do we know when we have effectively established rapport when matching and mirroring? The best way is: once you have been mirroring the person for a few moments, change your posture or gestures. If they unconsciously readjust their body language to suit yours, they are in rapport with you.

Often at seminars we can tell if six or seven people who are sitting together are friends. We can tell because they are sharing a similar posture in contrast with other people in the room. If one of them unfolds their legs, their friends soon adjust unconsciously to match them. This “test” for rapport is also called “leading”.

Leading can be used when we are attempting to get a person to change their body language associated with a certain mental state. For example, if you are in an important meeting and the individual you are talking to has an adversarial posture, (crossed arms, leaning back, looking down their nose) you first mirror their body language and communicating style, paying attention to their personality type as well. Once you can see that you are in harmony with them, you can lean forward or unfold your arms. In the majority of cases, if you have effectively mirrored them, they will move with you. You have lead them to a more receptive physical state.

Use Understanding Language

Use language that people understand. Be careful of industry jargon that you automatically use because you are surrounded by the jargon all the time. Remember many of your clients or customers may not specialise in the same area that you do so therefore they don't understand what you are saying or feel left out.

Storytelling

Storytelling is powerful. You are often better off handling an objection or making a point by saying “Let me tell you a story about how one of our clients handled the same situation you are in”.

Stories paint pictures, bring in the human element, trigger emotions, verify and add validity to situations. Facts and data are important but back them up with real life stories, metaphors or stories with learning points to support your facts and data's. This is why case studies, endorsements and examples are so powerful.

Listen Through Clarification

When listening to others clarify with the other person what you've heard them saying. This makes sure you are really picking up the right information. We like to say “Listen To Understand Not Just Respond”. Try and stop thinking about what you are going to say while the other person is talking. Instead focus on trying to fully grasp what they are saying. The other person will pick-up on your sincerity and they will began to trust you and feel respected and listened to. Once you've really heard and understood what someone says, it is very easy to respond. **Listen to understand not just to respond.**

Personal Rapport Versus Business Rapport

According to Shane Gibson, selling is “Creating an Environment so an act of faith can take place.” Part of creating that environment is getting prospects and clients comfortable with you so they feel more comfortable to be more open and honest. In turn you'll also become more open and honest. When two parties are open and honest a real Win / Win transaction can be put together. If we're not being open and honest there's a very good chance someone is going to lose .p ossibly both parties.

Remember ... in most transactions **‘if two people like and respect each other ... the details of the transaction will look after themselves.’**

The other side of the coin is:

‘if two people don't like and respect each other ... the details won't matter because there probably won't be a transaction.’

Rapport Building helps others to like and respect you.

Most of this module has been centred around building personal rapport. If you add Business Rapport to Personal Rapport you are even more powerful.

Business Rapport is when you show a client the actual measurable results you've achieved with other clients and how you can do the same for him or her. This kind of language gets the clients attention, especially top executives. What we're really saying is you must be able to prove you can deliver the results or the personal rapport will lose it's power.

The Principles Work

Knowing More About Your Customers –(Success Stories Feedback Session with Adcock Ingram – 27 May 2004)

- “We focused on reading the clients and understanding their personality style, this has helped us to get to know the client and we have been able to build a friendship relationship with our clients versus just a business relationship. This helped when I had planned a training session for the pharmacist assistants at a particular pharmacy. When I arrived I was amazed to see that the whole team was there including the pharmacist which is just unheard of. We had the most amazing session with the group, there was excellent interaction, good question time and the whole experience made me feel part of their team. They were confident in me and felt confident to share opinions and thoughts on the products. We did great business that day.”

Konono M.E Mogatusi, Medial Representative, Commercial Division, Adcock Ingram



- “We have been more open with the customer and we learn from them through understanding their personality profiles and making use of the power play network, we also use a needs analysis in pharmacies and doctors which has helped us to know their business better. I had a situation where I phoned one of my “A” doctors on his birthday. When I next went to visit he said “I remember you, you phoned me on my Birthday”. He told me that I was the first rep to even know when his birthday was and to make a phone call. Ever since that day, the doctor has always agreed to see me.”

Alex Bester, Medical Representative, Propan Zurich, Adcock Ingram

- “Our focus has been to add more value at each call, we have discovered common interests between the rep and the client, we feel more comfortable in conversation when detailing a product and there is a trust that has developed and it has built a closer relationship. I have just started repping a new area and in one of the pharmacies I had a unique situation, I made the call to the pharmacy assistant and when introducing myself I asked what her name is, she said Nmbola but she said everyone calls her Betty. I asked what she would like me to call her, she said Nmbola. While I was with the pharmacist asking for the order, the Pharmacist shouted over to Nmbola asking what we needed. Nmbola gave me such a big order. I was amazed that just a simple thing like calling someone by their name not a nick name as others had could make such a difference in the relationship.”

Neville Mackay, Medical Representative, Propan Zurich, Adcock Ingram

Summary

In This Module

1. You learned more about your own Personality Style.
2. You also learned more about “selling to” or “influencing” others by understanding their Personality Style.
3. You have identified specific clients or prospect and plotted their style and how to interact with them more effectively.
4. You received tips and did exercises on Building Rapport with clients.



Exercise 1

Utilising the Quick Read Tool plot out the personality style of the following people and discuss it with someone close to you to see how accurate the instrument is.

Name	Personality Style
Past President Nelson Mandela	
President Thabo Mbeki	
Oprah Winfrey	
Winnie Mandela	
Previous Head of SARFU Louis Luyt	

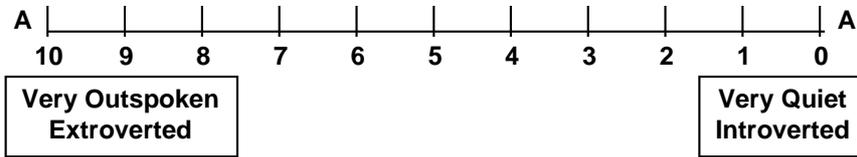
Exercise 2

Utilising The Quick Read Tool plot out the Personality Style of two clients or prospects and list how you could improve your communication and influence with them.

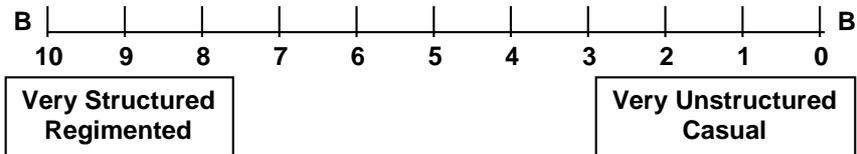
Client	Communication / Influence Improvement

Exercise 3: Plot your own Personality Style

1. Rate yourself where you would be most of the time in most situations with most people on line **A**. Very quiet to very outspoken. You must not pick a 5.

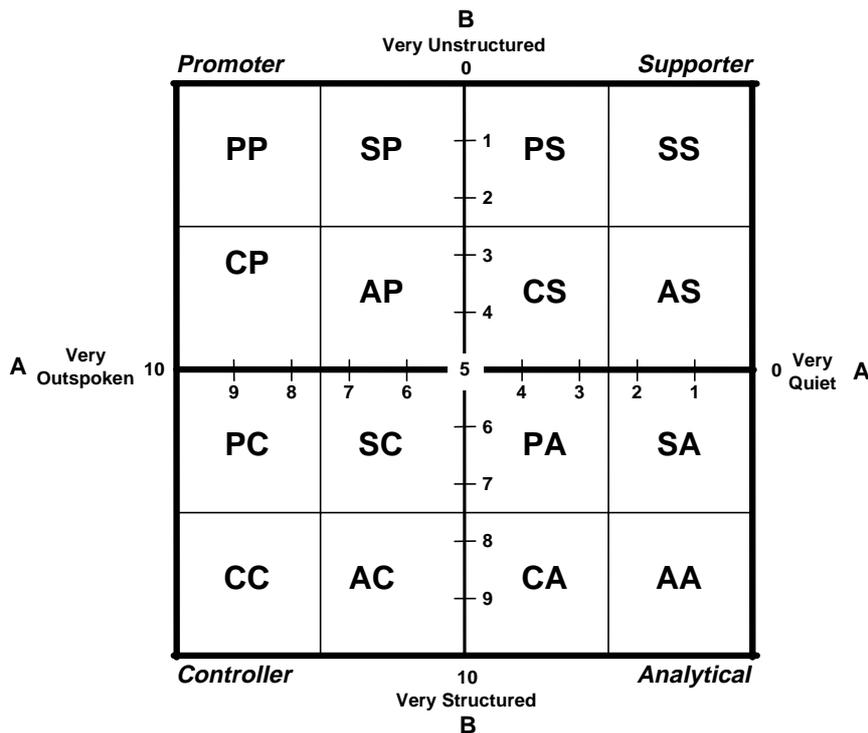


2. Rate yourself on line **B**. Very unstructured to very structured. Do not pick a 5.



3. Transfer the information on line A and B to the quadrant below.

HOW YOU SEE YOURSELF





Where Did You Fit In?

Transfer the information from the previous page and study your own profile.

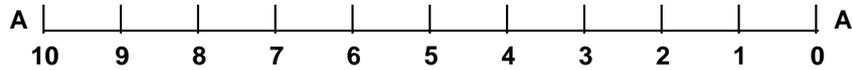
	Promoter Quadrant	Your Name
PP	Dominant in "Promoter" characteristics	_____
SP	Dominant in "Promoter" characteristics Secondary characteristics are "Supporter"	_____
AP	Dominant in "Promoter" characteristics Secondary characteristics are Analytical	_____
CP	Dominant in "Promoter" characteristics Secondary characteristics are "Controller"	_____
	Controller Quadrant	
CC	Dominant in "Controller" characteristics	_____
PC	Dominant in "Controller" characteristics Secondary characteristics are "Promoter"	_____
SC	Dominant in "Controller" characteristics Secondary characteristics are "Supporter"	_____
AC	Dominant in "Controller" characteristics Secondary characteristics are Analytical	_____
	Analytical Quadrant	
AA	Dominant in Analytical characteristics	_____
CA	Dominant in Analytical characteristics Secondary characteristics are "Controller"	_____
PA	Dominant in Analytical characteristics Secondary characteristics are "Promoter"	_____
SA	Dominant in Analytical characteristics Secondary characteristics are "Supporter"	_____
	Supporter Quadrant	
SS	Dominant in "Supporter" characteristics	_____
PS	Dominant in "Supporter" characteristics Secondary characteristics are "Promoter"	_____
CS	Dominant in "Supporter" characteristics Secondary characteristics are "Controller"	_____
AS	Dominant in "Supporter" characteristics Secondary characteristics are Analytical	_____



Exercise 4

Plot How Others See You

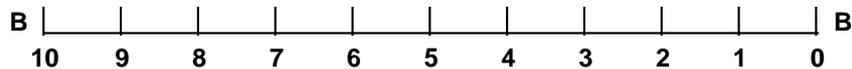
Find three people who know you quite well, preferably three people you work with or with whom you do business. Have them each rate you on line A and line B. They cannot give you a 5. Add the three scores up and then divide by three for an average. Then put the scores on the appropriate line.



**Very Outspoken
Extroverted**

**Very Quiet
Introverted**

Person 1 _____
 Person 2 _____
 Person 3 _____ Avg. Line A



**Very Structured
Regimented**

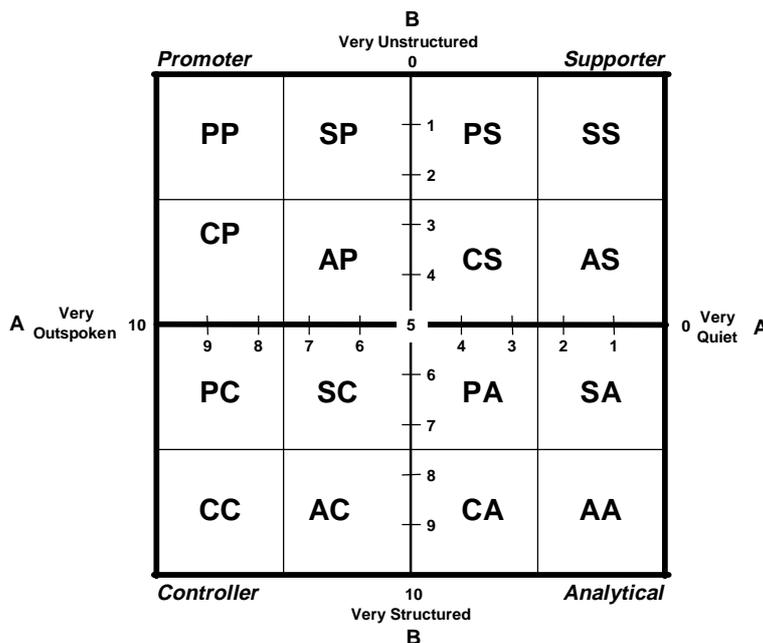
**Very Unstructured
Casual**

Person 1 _____
 Person 2 _____
 Person 3 _____ Avg. Line B

Instruction 2

Transfer the above information on line A and B to the quadrant below. **Note:** If either of the averages of line A or B lands on 5, shift it slightly to the side you had plotted for yourself on page 16. E.g. If line A - Other has you at a 5 and you had yourself on line A at a 6, then shift others to 5.2.

HOW OTHERS SEE YOU





Where do You Fit In?

Transfer the information from the previous page.

	Promoter Quadrant	Individual Name - Where They Saw You
PP	Dominant in "Promoter" characteristics	_____
SP	Dominant in "Promoter" characteristics Secondary characteristics are "Supporter"	_____
AP	Dominant in "Promoter" characteristics Secondary characteristics are Analytical	_____
CP	Dominant in "Promoter" characteristics Secondary characteristics are "Controller"	_____
	Controller Quadrant	
CC	Dominant in "Controller" characteristics	_____
PC	Dominant in "Controller" characteristics Secondary characteristics are "Promoter"	_____
SC	Dominant in "Controller" characteristics Secondary characteristics are "Supporter"	_____
AC	Dominant in "Controller" characteristics Secondary characteristics are Analytical	_____
	Analytical Quadrant	
AA	Dominant in Analytical characteristics	_____
CA	Dominant in Analytical characteristics Secondary characteristics are "Controller"	_____
PA	Dominant in Analytical characteristics Secondary characteristics are "Promoter"	_____
SA	Dominant in Analytical characteristics Secondary characteristics are "Supporter"	_____
	Supporter Quadrant	
SS	Dominant in "Supporter" characteristics	_____
PS	Dominant in "Supporter" characteristics Secondary characteristics are "Promoter"	_____
CS	Dominant in "Supporter" characteristics Secondary characteristics are "Controller"	_____
AS	Dominant in "Supporter" characteristics Secondary characteristics are Analytical	_____

Observe to see if others see you as you see yourself, and if not, try and find out why there is a difference in perception.



Exercise 5

Study the qualities of the four basic personality styles and then list the personal challenges you may have in dealing with these four styles in a sales situation. Base these challenges on your understanding of your own qualities that show up in your personality profile. E.g. If you are a Controller then a challenge you may have to overcome is trying to control another controller.

STYLE	YOUR CHALLENGES/PERSONAL ADJUSTMENTS
Supporter	
Analytical	



STYLE	YOUR CHALLENGES/PERSONAL ADJUSTMENTS
Controller	
Promoter	

The above exercise demonstrates the importance of shifting your own personality context when dealing with other styles. We are not suggesting that you change who you are, we are suggesting you be aware of the style characteristics of others and yourself, and be willing to adjust, in order to deal with people and situations more effectively.

In your client information sheet and client files, write in the one or two dominating styles that are characteristics of the individual you deal with. Review their styles before visiting, phoning, writing a proposal or doing a presentation.

Also plot out The Personality Style of close work associates and family members and list how you could better communicate with these people.



Exercise 6: Drop the Role

In what ways do you sometimes get caught in portraying a role instead of being a genuine sincere personable individual?

- 1. _____

- 2. _____

- 3. _____

- 4. _____

- 5. _____

How could you drop those roles and develop better rapport with the other person?

- 1. _____

- 2. _____

- 3. _____

- 4. _____

- 5. _____



Exercise 7: Matching the Total Person

Over the next two days, consciously mirror two different people and observe how you did it and what happened. Be aware of eye movements, gestures, postures, breathing rates, tonality and flow of language.

Person 1: _____

Observations:

1. **Eye Movements:** _____

2. **Gestures and Postures:** _____

3. **Breathing Rates:** _____

4. **Tonality and Flow of Language:** _____

5. **Overall Results:** _____



Person 2: _____

Observations:

1. Eye Movements: _____

2. Gestures and Postures: _____

3. Breathing Rates: _____

4. Tonality and Flow of Language: _____

5. Overall Results: _____

Quick Read Tool –How Others See You

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The Supporter

- Sensitive
- Lacks structure
- Save the relationship
- Loves to help others
- Persuade –g uarantees and assurances
- Speciality – supportive role
- Downfall – a friend in need
- Back up style under pressure – fit in

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The Analytical

- Provide details, facts and data
- Save face
- Lacks spontaneity
- Persuade – support principles and thinking
- Speciality – accuracy
- Downfall – decisions can take forever
- Back up style under pressure – to avoid

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The Controller

- Loves results
- Decision maker
- Save time
- Likes to be in charge
- Persuade – options and probabilities
– support their conclusions and actions
- Speciality – action NOW
- Downfall – need to be right /argumentative
- Back up style under pressure – my way or the highway

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The Promoter

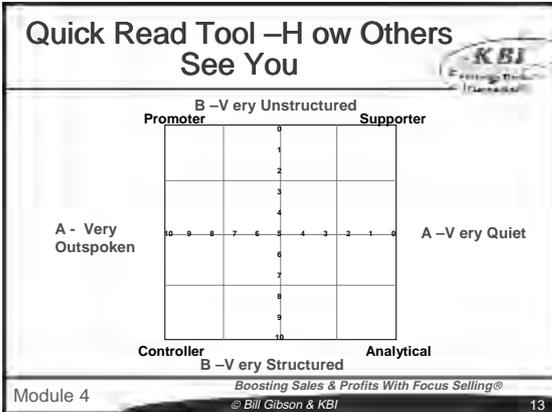
- Likes applause
- Best Starters
- Saves effort – takes short cuts
- Influenced by their dreams and intuitions
- Persuade – testimony & incentives
- Speciality – expressive
- Downfall – lack of focus, follow through and they think aloud
- Back up style under pressure – attack

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Quick Read Tool –How You See Yourself

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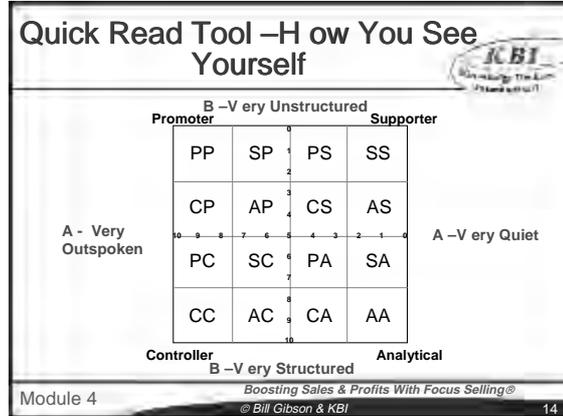
Quick Read Tool –How Others See You



A 4x4 grid diagram for 'Quick Read Tool –How Others See You'. The vertical axis is labeled 'A - Very Outspoken' at the top (0) and 'A - Very Quiet' at the bottom (10). The horizontal axis is labeled 'B - Very Unstructured' on the left (0) and 'B - Very Structured' on the right (10). The four quadrants are labeled: Promoter (top-left), Supporter (top-right), Controller (bottom-left), and Analytical (bottom-right).

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Quick Read Tool –How You See Yourself

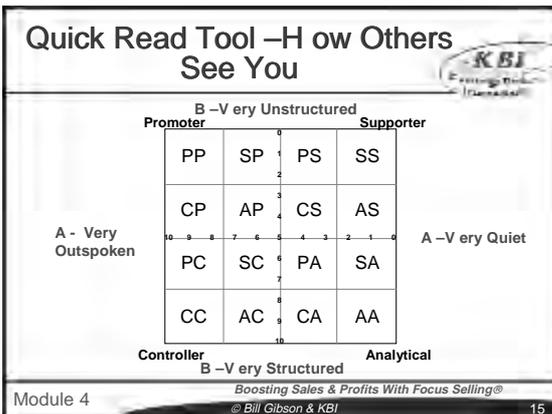


A 4x4 grid diagram for 'Quick Read Tool –How You See Yourself'. The vertical axis is labeled 'A - Very Outspoken' at the top (0) and 'A - Very Quiet' at the bottom (10). The horizontal axis is labeled 'B - Very Unstructured' on the left (0) and 'B - Very Structured' on the right (10). The four quadrants are labeled: Promoter (top-left), Supporter (top-right), Controller (bottom-left), and Analytical (bottom-right). The grid contains the following letters in each cell:

PP	SP	PS	SS
CP	AP	CS	AS
PC	SC	PA	SA
CC	AC	CA	AA

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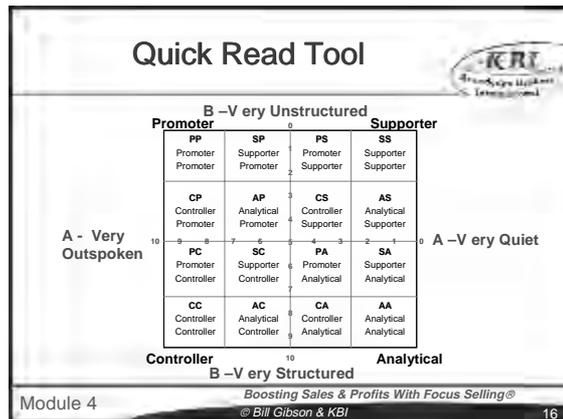
Quick Read Tool –How Others See You



A 4x4 grid diagram for 'Quick Read Tool –How Others See You'. The vertical axis is labeled 'A - Very Outspoken' at the top (0) and 'A - Very Quiet' at the bottom (10). The horizontal axis is labeled 'B - Very Unstructured' on the left (0) and 'B - Very Structured' on the right (10). The four quadrants are labeled: Promoter (top-left), Supporter (top-right), Controller (bottom-left), and Analytical (bottom-right).

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Quick Read Tool

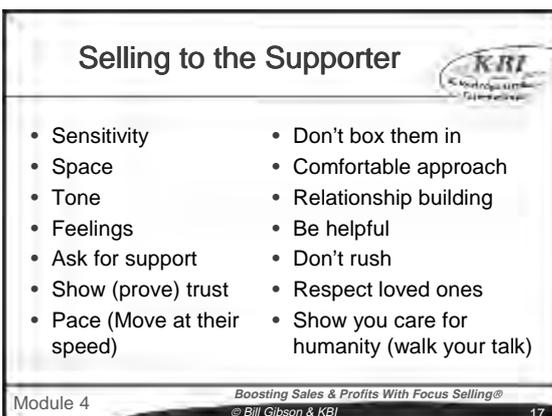


A 4x4 grid diagram for 'Quick Read Tool'. The vertical axis is labeled 'A - Very Outspoken' at the top (0) and 'A - Very Quiet' at the bottom (10). The horizontal axis is labeled 'B - Very Unstructured' on the left (0) and 'B - Very Structured' on the right (10). The four quadrants are labeled: Promoter (top-left), Supporter (top-right), Controller (bottom-left), and Analytical (bottom-right). The grid contains the following letters in each cell:

PP Promoter Promoter	SP Supporter Promoter	PS Promoter Supporter	SS Supporter Supporter
CP Controller Promoter	AP Analytical Promoter	CS Controller Supporter	AS Analytical Supporter
PC Promoter Controller	SC Supporter Controller	PA Promoter Analytical	SA Supporter Analytical
CC Controller Controller	AC Analytical Controller	CA Controller Analytical	AA Analytical Analytical

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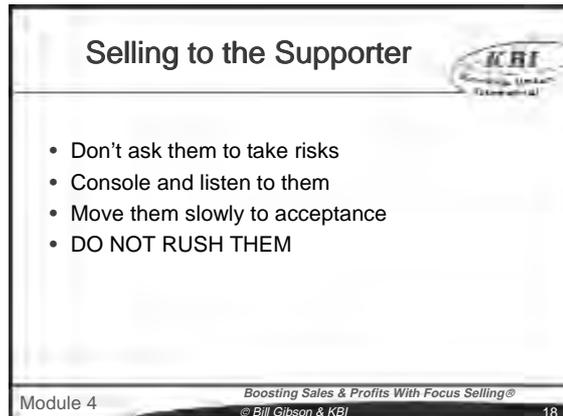
Selling to the Supporter



- Sensitivity
- Space
- Tone
- Feelings
- Ask for support
- Show (prove) trust
- Pace (Move at their speed)
- Don't box them in
- Comfortable approach
- Relationship building
- Be helpful
- Don't rush
- Respect loved ones
- Show you care for humanity (walk your talk)

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Selling to the Supporter



- Don't ask them to take risks
- Console and listen to them
- Move them slowly to acceptance
- DO NOT RUSH THEM

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Selling to the Analytical



- Cover the fine points
- Be accurate
- Be specific – details
- Deliver quality
- Talk savings/security
- Do your research
- Ask for their input
- Don't push them
- Don't embarrass them
- Don't be too flashy
- Respect their space
- Be friendly
- Do not interrupt
- Do not touch

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Selling to the Analytical



- Do not change direction once agreed
- Respect their schedule –pace
- Give them all the information they need to make a decision
 - Data
 - Graphs
 - Charts
 - Reports (they will actually read them)
- Acknowledge and work within their principles and thinking

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Selling to the Controller



- Talk results
- Talk profits
- Be concise
- Be clear
- Don't waste their time
- Stick to business
- Do not control
- Use logic
- Summarise
- Hit the high-lights

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Selling to the Controller



- Talk bottom line
- Give options
- Outline probabilities
- Show your ability
- Strong direct posture
- Do not be too chatty
- Don't get too personal
- Action

Expect a challenge

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Selling to the Promoter



- Exude energy and fun, give compliments
- Appropriate contact is OK
- Be witty
- Show flexibility
- Do NOT criticise
- They WILL attack under pressure
- Visually show response
- Be personal
- Talk to them – not down
- Have time for them
- Keep them away from details

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Selling to the Promoter



- Show them the positive impact they have on you
- Show them how to save effort and look good
- Be willing to listen to them expand on their concepts
- Keep them on focus
- Give them the opportunity to be:
 - 1st in
 - Pace setter
 - Ahead of the pack

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Quick Read Tool

B - Very Unstructured		Supporter	
Promoter	0	Promoter	Supporter
PP Promoter Promoter	1	SP Supporter Promoter	2
CP Controller Promoter	3	CS Controller Supporter	4
AP Analytical Promoter	4	AS Analytical Supporter	5
FC Promoter Controller	5	FA Promoter Analytical	6
SC Supporter Controller	6	SA Supporter Analytical	7
CC Controller Controller	7	CA Controller Analytical	8
AC Analytical Controller	8	AA Analytical Analytical	9
Controller		Analytical	
B - Very Structured			

A - Very Outspoken A - Very Quiet

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Building Bridges - Building Rapport

- Drop the traditional roles
- Monitor your body language
 - 7% is the words
 - 23% tone of voice
 - 35% facial expression
 - 35% body language
- Match / Mirror / Pace
- Use understanding language
- Story telling
- Listening through clarification (Listen to understand not just to respond)

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Building Rapport

**PERSONAL RAPPORT
VERSUS
BUSINESS RAPPORT**

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Module 5

Telephone Approaches

Learning And Sales Development Outcomes

In this module you will:

1. Be able to make outgoing Telephone Approaches in a more effective way.
2. Create a Pool of Questions for specific Target Markets and Target Groups.
3. Build your own 6 Step Format Telephone Approach Statement.
4. Be more effective at handling incoming Telephone Enquiries

***Ntsika Enterprise Promotion Agency,
with a focus of rendering non-financial support to SMME's
is part of The Department of Trade and Industry in South Africa.
Ntsika, along with the support of The European Union
assisted in the Initial Development of the
Boosting Sales & Profits With Focus Selling program
in conjunction with Knowledge Brokers International Limited.***

Module 5

Telephone Approaches

As a pro-active salesperson, executive or business owner you will have to get on the telephone and make outgoing telephone calls to set appointments with potential clients. This module is devoted to assisting you to be more effective at doing that.

Ridwaan Loonat from Johannesburg within 2 years has become a top performing Financial Adviser in the Financial Services Industry. His success would never have transpired at the rate it did, if he had not become a master at "making that initial contact approach on the telephone".

When he was interviewed he said the following:

"Don't use a boring script. Be unique; offer something fresh and new because people like to keep up with the times with something new or fresh. Also speak to try and help. Display confidence and enthusiasm and don't sound like you are begging or are a bother. You must have the right attitude and display that attitude when you get on the phone. All the skills in the world mean nothing without the right attitude coming through." What Ridwaan is really saying is, "Who would want to get a telephone call or see a timid, unconfident, unenthusiastic salesperson? Very few people!"

Ridwaan's advice in our opinion is excellent advice for all those who need to use the Telephone to approach clients for appointments or make actual sales and get commitments on the telephone.

Clear The Desk:

Before starting an appointment setting phone session, clear your desk top so that all you have in front of you is the contacts you wish to phone and "**appointment setting memory joggers.**" (These are quick "at a glance" guidelines and statements that help when making the calls.)

Phone In Blocks Of 20:

If you are using the phone book, directories or lists to make cold calls to set appointments, we suggest you do it in blocks of 20. Make 20 calls, take a break. Make 20 calls, take a break. Don't leave your chair and the phone until you've made 20 calls. If you commit yourself to this, you will get your calls made. Continual phoning takes a lot of energy, a certain level of enthusiasm and concentration. If you go past 20 calls, there is a good chance you may get tired and your voice may lose its enthusiasm and become monotone. If you don't get to 20 calls, you are not giving yourself enough chances to succeed and you may become disillusioned. With 20 calls, you are bound to experience some success. You can also do it in time blocks. You decide you will call non-stop for 1 hour, take a break, call for 1 hour, take a break, call for 1 hour etc.

Never Give Up:

As Churchill said, never, never, never give up. It often looks like this, No! No! No! No! No! No! No! No! No! Yes! Yes! Yes! Yes!

The only reason why a lot of salespeople don't make it in business is they give up just before they would've succeeded.

Use Your First And Last Name:

We've all had someone call us on the phone and say, "Hi, this is Thside, can I speak to you for a moment?" You are thinking, "Thside who?" Often the rationale behind using the first name is, you deal with your friends on a first name basis, and it is comfortable. The problem is, this person you are talking to is not your friend and unless you use both your first and last name, you leave a tremendous "Credibility Gap" with the person you are calling. (Also be aware of what different cultures expect)

State Your Name Effectively:

It is more effective to say "Hi, this is Mashudo Molese", rather than "Hi, my name is Mashudo Molese." If your friend Jannie calls up, would he say "Hi, my name is Jannie." You'll find the reaction to saying "this is" vs. "my name is" is quite different. Rather than saying "I am Mashudo Molese" or "My name is Mashudo Molese" it is more effective if you said, "Mr. Jacobson, Mashudo Molese, Protea Hotels." This works very well with top executives, high income earners, professionals and successful business owners. It is "direct" and "punchy" and it wastes no time. When you meet someone on a personal face-to-face level, you will usually state your name as you shake hands. You don't say "my name is ..".

Use The Person's Name:

Confirm that you have got the right person. Use the clients name early in the call. It is honest and respectful. It works! Be careful of gimmicks as attention grabbing statements. There is a "school of thought" that says calling the client Mr. Ohara or Mrs. Ohara, is too formal and traditional. Using only the person's first name may be overly familiar and stepping over the boundary line, because you really don't know the person yet. An option that is often used successfully is to use the person's first and last name when you initially state his or her name. For example you may say, "Is this Michael Ohara?" Often the person acknowledges it is him, you then may move to "Mr. Ohara", even "Michael".

Respectful Openers:

With top executives, high income earners and successful business people, the following example works well.

"Dr. Zuma, it is an honour to speak to you."

"Mr. van Rooyen, thank-you for taking my call personally."

"Mrs. Charnely, it is a pleasure to speak to you directly."

"Mr. Kersner, it is a privilege to speak with you."

There is a ring of respect in these openers using the prospects name. It inspires them to listen further.

Be Yourself:

When you are preparing your scripts for making those initial contact calls for appointments, be aware that your writing style and language may be quite different from the natural way that you speak. Read the scripts out loud and only utilise words, phrases and a style that you feel 100% comfortable with. The script must be you. Try it out with friends, family and work associates first. Have them tell you if it is you or not.

Remember, you are a unique human being with a style, personality and language of your own. Differentiate yourself by being your relaxed, sincere and professional self. It is good to model yourself upon successful people but it is important to adjust the way you do things, so your personality comes into play.

Talk With People:

"Talk with people" rather than "Speak at them". "Extend yourself to them" through the phone rather than "projecting yourself at them". "Talking with people" and "extending yourself" is much warmer, more genuine than "talking to" and "projecting".

Is It Convenient:

When you reach someone on the phone, always check if it is convenient for them to talk right now. Some people say "do you have the time to talk?" The shortcoming on this one is that they may have the time, but it is not convenient because of who is standing at their desk, or because they are driving in their car and the traffic is heavy. They could be on their cell without a "hands free" mechanism and the police are just ahead or they could've just stepped out of the shower or are in the middle of their dinner.

Unique Name – Spell It!

If your name or the spelling of your name is slightly different than normal or if you have a tough name to spell or pronounce, utilise it to gain impact. "Hi, this is Johanne Polezzi, let me spell it for you. That is J-O-H-A-N-N-E with two N's and E and P-O-L-E-Z-Z-I. Johanne Polezzi ... pronounced like Police-e. (By now your name has really sunk in.)

Spell Their Name:

When getting a name or information from someone, do not feel embarrassed to ask them to spell someone's name including their own. This shows care and efficiency. It could go something like this. "To make sure I am accurate in the future, could you spell that for me?"

Do You Have A Pen Handy:

When someone says to you, "Have you got a pen handy, I've got some important information for you", there is a tendency for you to pick up the pen and focus on what the other person is going to say. When you've got information you want them to focus on, ask if they have a pen handy ... you are sure they'll find what you are going to say is useful and they will want to write it down.

For example, a Financial Adviser may say this:

"Have you got a pen handy? You may want to write this down. I'll give you a minute to get a pen" – silence – "Have you got the pen?" Client replies, "Yes". "Draw a square! Now divide it into 4 squares! In the top left quadrant, write Protection Planning. In the top right quadrant, write Retirement Planning. The bottom left, write Investment Planning and the bottom right, write Emergency Savings. Those are the 4 quadrants of your life I will focus on with you when we meet. Most of us ignore the Emergency Savings. Are you covered in that area?"

The Sound Of Their Name:

During a telephone conversation, repeat the person's name a few times, but don't over do it, or it will sound insincere. People love the sound of their name and all their life people have used their name to get their attention. A person's name used appropriately works magic.

Listen To Understand:

Listen to understand rather than just listening to respond. Slow down, pause and give people time to think and answer. Try not to interrupt when the other person is speaking. Become conscious of what is happening with you on the phone. Be present. Monitor yourself. See how often you do not let the other person finish speaking before you respond, or defend a point. When you model an eagerness to truly listen, the other person is more apt to listen to you more.

Use Trigger Points:

In the beginning you will definitely find a telephone script helpful, but we would suggest you quickly move to structure how and what you want to say with "trigger points". Try and avoid reading the script in a robotic fashion like some telemarketing people who make you feel like you are not even in the process ... you feel left out! Be genuine and sincere. The listener will pick it up.

Suspend Judgement:

There is a universal law that says, "The level of my receptivity and acceptance towards you will eventually be equal to your receptivity and acceptance towards me." It seems that if the person that is the most open, receptive and accepting, holds strong with that approach, the other person eventually will gravitate to the same level of openness, receptivity and acceptance. Stay open, receptive and accepting with the other person on the phone and watch how quickly it helps change their position if they are not initially that way.

Be Spontaneous And Flexible:

Be ready for unexpected opportunities to "break the ice" and "develop quick rapport". For example you call an office and ask for Kobus van Niekerk. While Kobus is coming to the phone, you hear laughter in the background. When he picks up the phone and says, "Kobus van Niekerk speaking", it may be appropriate for you to say, "Sounds like you people are having a good time ... I think I'm working in the wrong place." He laughs, and then you introduce yourself. Your statement was in-line (congruent) with the situation. If you had to go straight into a serious introduction, it would not have been congruent and an opportunity for rapport building could be lost. Another example would be; you call a home to speak to Mrs. Rogers. She picks up the phone and says "June Rogers speaking". Meanwhile there is a baby crying real hard. You say, Mrs. Rogers, I think I've called you at a difficult time, sorry for the disturbance ... I'll call you back later, so you can attend to the "little one". If you went straight into why you've called, it wouldn't be congruent. By calling back later, you show your sensitivity to the situation and she will be quite open to talk.

Know Your Customers:

If you are dealing with retailers learn all you can know about retailing, if it is manufacturers, know their challenges and how the industry works. Take the time to know their Business and Industry.

- Gather as much information about the possible needs, your target market or the client you are going to call.
- Gather brochures or download information from the web site about the company you are calling on or for the company your client works.
- If you are making calls to accountants, doctors or lawyers find their professional bodies' web sites and gather information about these professions.

This will give you background information on the company or profession's need or concerns and will be invaluable in preparing your telephone call for success.

The more prepared you are and the more you can customise your approach using this information, the more chance you have of successfully getting an appointment and taking the process forward to the next step.

Once you establish commonalities, trust and rapport kick in.

Smile – The Mirror:

Remember when you make contact on the telephone, it is a "live" commercial or advertisement. Smile, people can detect a smile. Put a mirror where you can see yourself. It reminds you to exude energy.

Long Distance Calling:

If you are calling long distance, let the person answering know that. The telephonist usually places more importance on your call just out of courtesy.

Match Their Speaking Speed:

Match your speaking speed with that of the person you are talking to. You do not need to imitate the person's tone or speaking style, just match the speed. We would suggest 80 to 100 words per minute. A fast speaking person will be running at 100 to 125 words per minute. Talk faster with a fast talker, if he is real fast; do not try to keep up with him. Talk slower with a slow talker. Be distinct, natural and clear and at all times and be pleasant. Keep the telephone mouthpiece approximately $\frac{3}{4}$ " – 1" from the mouth to avoid unnecessary sounds from the mouth. Try to buffer surrounding voices by holding the phone in a certain way or using your body as a shield.

Communicate As if Face to Face:

Communicate as if you are face to face. Listen closely to the voice tone. Match the tone and speed to develop rapport. Visualise the person's body language and facial expressions and sit the way you think they are sitting. Trust your intuition, or that computer you own, called the mind. You have talked to thousands of people. Your mind can relate the voice tone and expressions to body language. Trust yourself. Make it a game, to practice and keep in shape mentally, visualise how friends and relatives are sitting, etc. when talking to you on the phone and then ask them to verify your accuracy. After a while, you will get good at it.

Remember in one-to-one communications effectiveness, 7% is in the words, 23% is in the tone of the voice, 35% is in the facial expression and 35% is in the body language.

Also consider using a "headset" and try standing up when talking. Some people are more effective when moving around and talking, especially expressive people.

Adapt to various Personality Styles. Different people have different Personality Styles. Some people are Analytical and more conservative. Others are very Supportive and helpful and are relationship oriented, many are highly expressive promoter types and you have hard driving, very direct dominant Controlling type people. Get to understand the styles of people and be prepared to adjust your approach or way of communicating with these people.



Use Understandable Language:

Keep your language simple and understandable. Avoid jargon unless you specifically use it to trigger a response. A Financial Adviser could say:

Adviser: What we do is an F & A with you.

Prospect: What is an F and A?

The adviser can expand on it. It is a Financial Analysis!

Consider Affirmations:

It is important to stay relaxed, focused and energetic. Consider displaying affirmations that will help you to be more effective on the phone. By repeating them continually, they affect the subconscious mind and eventually the statements become your thoughts and actions.

Sample Affirmations:

Organised – Relaxed – Energetic – Having Fun

Disciplined – Focused – Centred – Committed.

Phone! Phone! Phone! Phone! Appointment! Appointment! Appointment!

I'm a master at using the telephone.

Do What I Love – Love What I Do – I'm In The Zone.

Enthusiastic – Optimistic – Active – Positive

Courageous – Brave – Strong – Consistent.

End With a Question:

After giving an answer, end it with a question to be sure you have covered everything.

“Does that answer your question?”

“Do you see the value of taking that approach?”

“Can you see why it is important to have regular maintenance on the property?”

“Can you see why we should get together right away and look after that situation?”

Reward Program:

In the Financial Services Industry many of the “Old timers” used this simple approach - the simple reward program they've used for years. They sit down and start calling and refuse to get up until they have set 5 appointments. They simply write 5, 4, 3, 2, 1 “Reward”.

It looked like this for them:

5	5	5
4	4	4
3 or it could be ...	3 or it could be ...	3
2	2	2
1	1	1
Beer!!	Go Home!!	Dessert!!

They cross off a number as they make the appointments. Cross off number 5, there is 4 to go. Cross off 4, there is 3 to go, etc.

Add Value:

Make sure that your conversation with the client is designed to ensure that they understand that you would not be calling on them if you didn't believe that you have something valuable to share with them. If the client does not get this message, you may very well get the “I am not interested” objection.

Be Referred:

Get someone to refer you if it is at all possible when you are trying to set an initial appointment. Ideally, the individual who has referred you, will have credibility and this dramatically improves the process of building rapport, because you both have the referral person as a common denominator.

Benefits! Benefits! Benefits!

“What's in it for me?” ... has to be answered by stating some kind of benefit up front. While on the phone, imagine that there is a clock ticking in the background, in the prospect's mind. The longer the clock ticks without you giving the prospect a reason to stay on the phone, the more likely you will lose that person. Have you ever received a telephone call at home and a telesales person on the other end of the phone says, “Hi, Mr. Da Gama, how are you tonight?”

What you immediately think is “Who are you” What do you want from me?”

You are thinking “Get to the point because I'm going to say goodbye to you as quickly as I can.” The longer the person goes on without telling you what is in this conversation for you, the more impatient you become. Try to, as early as possible to say, Here's who I am, first and last name, what your position is, and that you are with “such and such” company and why you are calling and the reasons why the person should listen. Remember, your first sale is to get a minute on the telephone.



The Power of Questions:

Well structured thought provoking intelligent questions demonstrate that you are competent and a professional. The right questions also build trust.

Client involvement in the telephone conversation is important and this is accomplished through a series of sincere questions and good listening skills.

Put serious thought into which questions should be in your initial contact telephone approaches and for which situations and with what type of Prospects and Clients.

A mixture of closed questions, open questions, requests, leading questions and directive questions are very effective. (These types of questions are covered in Module 6. Approaching and Uncovering Client Needs.)

Pool of Questions:

Have a "Pool of Questions" to draw from in order to help uncover specific needs of specific groups of people. This helps you move towards an appointment.

These could include:

- Business Owners
- Women
- Generation X Individuals
- Retired People
- Single People
- Doctors, Dentists
- Executives
- Retailers
- Affluent Blacks

Words To Avoid:

Don't use Yep! Yah! Nope! Yeah! Try Yes or No. Avoid slang like sweetie, Darling, etc. You are talking to a customer. Use their name, not Sir or Madame.

Words That Make A Difference:

Following are some words and phrases that could make your communications on the telephone stronger:

- Special
- Exclusive
- New
- Profitable
- Discover
- Excited
- Focused
- Extraordinary
- Brilliant
- Save
- Update
- Important
- Protect
- Prevent
- Innovative
- Earn
- Superb
- Empowered
- The best part is
- Gain
- Advance
- Plans are underway
- Higher rate of return
- Confident
- Happy
- Peace of Mind
- Secure
- Guarantee
- Definitely
- Easy
- Opportunity
- Quickly
- Proud
- Will
- Can
- Relieve
- Demonstrate
- Wealth
- Immediately
- Maximum Benefit
- Freedom
- Your money working for you
- Perfect
- Enlightened
- Focus
- Spare a few minutes
- Ensure
- Unique
- Entitled
- Credible
- Wise
- Preserve
- Off-Set
- Excellent Investment
- Free

List of Objections:

Make a list of all possible objections, challenges, situations or hurdles that may get in the way during the phone call and have the answers to these. After a while, all telephone calls become easy. (Module 8 – Handling Objections and Concerns.)

Appointment Basics:

Once you've set the appointment, do the following:

- Repeat your name, the date, time to the prospect.
- Ask for directions and necessary parking arrangements.
- Give him/her your office and cell phone number in case of a change in plans. You could also give your e-mail address. " Mr. prospect, please contact me if there are any changes in plans"
- Thank the Prospect.
- Allow Prospect to hang up first.
- Record the appointment in your follow-up system.
- Enter necessary information on the Prospect's File.
- Follow-up on anything you promised to send etc.

Note:

If the appointment is made a week or more in advance, make a quick call the day before to confirm that the appointment still stands. Your time is money. Don't waste it going to "No show" appointments.

Dealing with “Screeners”:

- When telephoning for appointments it is very important that you treat every one you speak to equally. When speaking to the PA, secretary or other screeners, ensure that you treat them with the same respect that you would if you were speaking to the client.
- You will often have to speak to a screener, who has been given the job of screening all the calls coming into their boss. They are there to ensure that no one will waste their bosses' time. When phoning after hours, you may reach the spouse who will very often operate in this role, trying to protect their spouse from incoming business calls after hours which impacts on their relaxation time.
- If you alienate these people by trying to trick them or bully them, you will never succeed in your endeavour, if you make a friend; you succeed where others have failed. Your mission is to get “screened in”, not “screened out”.

First of all, be polite, but firm. Screeners cannot buy your products. Screeners cannot give you a yes. Screeners, however, can say no. They don't say, “No, we're not interested.” They just somehow never connect your call. Use their names. A nice convenient way to do this is after you leave a message the first time, if they identify themselves by name – write it down. Get it every time. If they don't give you their name, just say, “Excuse me, and by the way, what's your name please?”

“This is Mary.”

“Thank you Mary. I appreciate your help.”

That's all you have to say. Write it down, the next time you call, you know Mary. You will get better treatment than someone who doesn't know her.

When asking for a decision maker, it's a subtle thing, but I think you'll find it more effective to say, “Hello, I'm calling for Kobus van Zyl please.” Or maybe just, “Kobus van Zyl please,” instead of saying, “May I speak with Kobus van Zyl please?” What's the difference? In the first case, when you say, “I'm calling for,” it's very polite, you're still saying please, but it's an authoritative statement. You are starting to communicate, “I am a person who is valuable, I expect to be let through.” It's a subtlety, but it's a lot stronger than saying, “May I speak with so-and-so,” which really means, “May I please have your permission to speak with so-and-so?”

At no time display arrogance or become too authoritative.

Make a list of the common hurdles to getting to the key person on the phone and determine several alternatives in reference to making contact.

Examples of hurdles and challenges:

- “He is in a meeting and cannot be disturbed.”
- “She does not take calls from salespeople she does not know.”
- “I set her appointments, what are you calling about?”
- “We are well looked after in that area, I know Mr. Simpson will just say no.”
- “I will have him call you.” And he never does call back after several phone calls.

Lets take a look at some possibilities in handling these changes:

“He is in a meeting and cannot be disturbed”

If this is a situation where you have been playing telephone tag and the client really wants to speak to you, you may say something like this:

Salesperson: “Gosh, that is really unfortunate.”

Receptionist: “Why is that?”

Salesperson: “He has called me several times and I have done the same and he keeps missing me. He must be getting quite frustrated.”

Receptionist: “Has he?”

Salesperson: “Yes! You know just to make sure he does not get upset that he missed me again ... is it possible to slip him a note to let him know I am on the telephone line ... he might appreciate it. Then be silent.

Most often, the receptionist will hand a quick note to the person I am calling and most of the time the client is not in a meeting where he cannot be disturbed. He is often with a co-worker or staff member.

If she says he is with a client and probably would not like it, then encourage her not to interrupt.

“She does not take sales calls from people she does not know”

“Maybe you can help me. What are the best procedures for me to go through to get an appointment?”

By doing this you are respecting the personal assistant and showing that he is important. Now you have a chance to talk to him and develop rapport. It may also be advisable to ask a few questions about the personal assistant himself, e.g.

“You really know the best procedures, have you been with her long?”

After talking for a while the personal assistant may decide to help you with a few short cuts to the boss.

Salesperson: “I am sure you and your boss are inundated with calls from people like me and you would never get anything done if you took all the calls.”

Receptionist: “That is correct.”

Salesperson: “I respect the procedures you and your boss have set up.”

Receptionist: “Thank you.”

Salesperson: “May I explain why I am calling to see if I may warrant an appointment even though your boss does not know me?”

Receptionist: "Yes." Once again you established the relationship with the receptionist.

Salesperson: "She may not know of me personally, but I do business with Jane van Rue and Simon Cassidy who are close business associates. They asked me to contact her." This kind of statement usually changes the reaction to a more positive, helpful one.
"The reason I am calling is that we have the new system that is cutting electricity bills in half for corporations. It is the one that was written up in Times Magazine and the one XYZ company has implemented. I think your boss may feel it is worth his time, what do you think?"

Moving right into showing the importance of the call and the benefits to the client can trigger a more positive reaction.

"I set her appointments, what are you calling about"

Again, this is where you develop rapport with the personal assistant and show the importance of the call. The above examples changed slightly will work.

"We are well looked after in that area, I know Mr. Simpson will just say no"

Salesperson: "Does the company you are using now have this, this and this? Do they do this, and this for you?"

This procedure may open up a possibility where the personal assistant recognises this is different.

Salesperson: "Could you tell me when the decisions are made each year in reference to the product we offer?"

Salesperson: "Mr Jackson asked me to call Mr. Renner and he is familiar with what you are now doing. He thinks we have something superior. I think Mr. Jackson would be disappointed that Mr. Renner does not get a look at what I have got. Mr. Renner himself may be upset if his company misses out on the savings." Silence.

This triggers a more positive response because of the referral. It changes your status and makes the person see value.

"I will have him call you"

... And he never does call back after several calls.

Solutions:

- Solicit the help of the personal assistant on how to get the response. Make friends with the personal assistant and get her or his empathy.
- Send a fax and politely point out that you know the person is busy yet why they may want to respond. Even suggest certain solutions by just ticking the box. Find someone who knows the person who will network the way in for you.

The possibilities for handling these phone calls are only a few of the many options. Brainstorm with other members of your sales team for solutions. Also have a list of these hurdles and continually ask other types of salespeople and executives the best way to get through.

Use the Whole Story Approach when opening up a conversation with someone.

- Example:

Salesperson: "Mr. Heinburg, my name is Bill Gibson. We have never met before, but I was on an airline last week between L A and Chicago and I was working on a training program I am producing. There was an elderly gentleman sitting next to me and he could not help notice what I was doing. He began to ask me what I was doing. The man was your father!"

Prospect: "You were sitting with dad!"

Salesperson: "That is right and he asked me to phone and say hi."

Prospect: "Great."

Salesperson: "He also said that the kind of program I am working on may be of real interest to you and to phone and see if you could find some time for me."

Prospect: "No problem. How about 10am on Monday?"

This is the whole story approach. It helps people to see a picture and what you are saying become more genuine and interesting.

- Another example:

Salesperson: "Our bank has recently discovered that 35% of all mortgage bonds in this country will be reviewed this year ... so we decided to contact all corporate clients to let them know we can offer a special rate to the employees who have mortgages that need to be renewed. Can I set an appointment to discuss this with you."



Exercise 1:

Put together a "Pool of Questions" for three specific groups of people that you deal with on a regular basis. It could be women in business, retired people, Executives, Doctors, Dentists, Retailers, and Affluent Blacks. It could be the top 5 Target Markets / Groups you identified in Module 2.

Group	Questions
1.	
2.	
3.	

Telephone Approach Format

Following is a telephone approach format that works well, especially when contacting busy and top end executives, business owners, VIP's, etc.

The Format:

1. Clients Name
2. Respectful Opening
3. Identification
4. Bridging Statement
5. Attention Grabber
6. Exploration Question

1. Clients Name

Make use of the clients name and use the formal Mr. or Mrs. ... or the full first and last name and then swing into Mr. or Mrs. ... until they tell you to call them by their first name.

2. Respectful Opening

When you get through to the client, you could use one of the following Respectful Openings to get the conversation going:

"Mr. ... it is an honour to finally speak to you."

"Thanks for picking up the call personally."

"It is a pleasure to speak to you."

"It is a privilege to talk to you directly."

Avoid the ritual of asking, "How are you today?" or "How are you doing today?" Remember you are a stranger to this person.

3. Identification

This is where you introduce yourself and your company.

Do not say "I" or my name is ...

Rather say Mr. X, your name, your company's name. (Mr. X, Romano, South African Brewers)

4. Bridging Statement

Once you have made your respectful opening statement, you will use this bridge statement to lead into your attention grabber reason for the call. These could be something like:

"During a conversation with ... last week"

"While visiting with ... last week"

Together with ... we discovered"

"Could you imagine .."

"Let me ask you .."

"What is your opinion of .."

"I'm going to make a statement and I'd like to know if you agree with me or not"

5. Attention Grabber

If you are phoning after having sent a letter, then the attention grabber would be a paraphrase of what was in the heading of your letter. If this is a cold call, then this would be the reason the potential client will want to continue talking to you and agree to an appointment to discuss this matter further.

Attention Grabbers that could be used are:

(Could be after a letter or when making a cold call.)

"One of my clients retired in 10 years after joining our Real Estate Investment Club."

"My clients in the last year have reduced factory maintenance costs by 30% with our TurnKey Maintenance Outsourcing Package."

"A division of ABSA Bank, one of our clients in PE increased sales by 181% with our implementation sales process."

"Medical aid costs for our clients have increased far less than the average in the industry."

"Our clients have been able to contain their medical aid cost increases to a rate that is lower than the average for the industry."

It is very important to keep this exchange conversational and to always be ready for the client to interrupt your presentation to ask questions and ask for more information.

6. Exploration Question

Do not ask for an appointment at this stage, rather you should ask the client a question that would get them to explore their interest in the possibility of exploring further this sort of solution and which would apply to their situation.

This could be:

"Does this touch any of the top 3 issues of concern in reference to your financial planning?"

"Would you be interested in exploring the process that gave these results?"

"What would be the best way to see if we could help you realise similar or greater benefits than what Siemens did?"

Putting it all together, the 6 Step Format process would look as follows:

1. Clients Name
2. Respectful Opening
3. Identification

4. Bridging Statement
5. Attention Grabber
6. Exploration Question

You have been given a referral for a client, Mr. John Jackson, who is in a senior position with Volkswagen and you were referred to him by Hendrick Slabbert of ABSA. You make a call to the client utilising the 6 Step Format Approach.

"Mr. Jackson, it is a privilege to reach you personally ... Bill Gibson, Knowledge Brokers International."

"Last week during a conversation with Hendrick Slabbert of ABSA, he indicated that you may be interested in the same process that created record breaking sales for his team. These results may be hard to duplicate, but would you be interested in exploring the process for your business?"

This is an example of how it would sound once its pieced together.

The 5 Different Ways Of 'Breaking The Ice' On The Telephone

In Module 6, Approaching and Uncovering Clients Needs we explore 5 different ways to "Break The Ice" with clients in person and on the telephone. They are:

1. The Courtesy Approach
2. The Focus Approach
3. The Main Benefit Approach
4. The Whole Story Approach
5. The Formal Information Gathering Approach

Following are a few quick examples of these approaches on the telephone. For more in depth information on these approaches go to Module 6.

We will now look at how these approaches apply to Initial Contact Approaches on the telephone.

1. The Courtesy Approach

The courtesy approach can come in several forms. Four common ones and examples of them are as follows:

- a) A sincere compliment as congratulations.

Example:

"Mr. Prospect, Lucky Mbuleke, TranSky Realty. Congratulations! I see in today's newspapers you graduated at the top of the class as a new Chartered Accountant. You obviously worked hard to receive that honour!

- b) A statement about something "topical" or "exceptional" that both people would agree upon immediately.

Example:

Nora: Mrs. Prospect, thanks for taking my call. It is Nora Sibisa of Investment Cars calling. Did you see the great news on the front page of today's paper where interest rates are down 4% over 2 years ago?

Prospect: Yes, I saw that! It is amazing.

Nora: Does it affect you in any way?

- c) A non-threatening courteous statement ended with a question.

Example:

Sadib: Mrs. Prospect, it is Sadib Pillay from Executive Suits, in Umhlanga, you've been promoted to the Head of Marketing at your company. You must be happy about that.

Prospect: I sure am.

Sadib: Can I pop by with our new catalogue of Executive Suits and discuss our Executive Budgeting Package for Senior Executives.

- d) An offer to help in the form of a question.

Example:

Tinnie: Mr. Prospect, it is Tinnie Maritz from Sanlam. Did you know there is only 1 week left in the tax year and I still could put something together to defer some of your income from this year?

2. The Focus Approach:

This is where in most cases the opening statement will focus on a specific topic, service, product or reason for calling the Prospect.

Example:

Jannie: Hi, Mrs. Prospect, I'm Jannie Kruger from Residential Landscaping. I'm working on a "Special" project that focuses on making the Brooklyn area more green.

Prospect: Yes.

Jannie: May I have a few minutes of your time to ask a few questions?

3. The Main Benefit Approach

Example:

Andre: Mr. Prospect, I'm Andre Gouws from Knowledge Brokers International. Your good friend Frank Barkly suggested I call you about our new Business Success Series.

Prospect: Okay.



Andre: He mentioned you have 10 salespeople. Did you know that with us we could help you put those 10 Salespeople on a 10 week sales training program for only R1 400 per week?

4. The Whole Story Approach

The Whole Story Approach could utilise the principles of any of the other four approaches. We are suggesting that by painting a picture with a more complete story, people will have more empathy and understanding, therefore positively responding more often.

Example:

Bond Broker: Mr. Prospect, my name is John Doe, I'm with ABC Bond Brokers. You can probably tell by my accent that I'm from the United Kingdom. I came to South Africa 3 years ago on a project and while I was here, I met my wife. We got married a year ago. 8 Months ago, the project finished with the bank I was with and I had a specialised profession of which there were no openings here in South Africa. In order to stay in this country I took on a new career as a Bond Broker with ABC Bond Brokers. My auditing and financial background is a great asset in this business. I would be grateful if you would allow me 20 minutes of your time to show you what I've been successful at doing around helping homeowners save thousand on the interest on their bonds. I give you my word, if I meet with you and you are not interested, I'll be on my way. Your only investment is 20 minutes. May I come and see you?

It sounds a bit long winded, but in essence what it does do is grab the interest of the person you are talking to and leads them through to a conclusion. This one works well, for people especially on a cold approach over the phone, in person, or even a letter, fax or an e-mail.

5. The Formal Information Gathering Approach

A great way to really break the ice and develop rapport is to do a needs analysis with a client. During a needs analysis, the relationship definitely develops between the salesperson and the Prospect or Client.

On the telephone, an information gathering approach or survey approach can help Break The Ice and get an appointment with a Prospect and even sometimes sell products and services directly.

There is more on Formal Information Gathering Approaches in Module 6. Look for ways to adapt the tips and guidelines utilising the Formal Information Gathering Approach on the Telephone.

Closing The Appointment Commitment Examples

We have supplied examples of a number of different closes for getting an appointment commitment.

The majority of them are actual ones used by experienced salespeople.

The most common one is the "Shut Up" Principle Close. You suggest a time and then pause and wait for the clients reply.

Closing The Appointment Commitment

- | | |
|---|--------------------------------|
| "Can I make an appointment to see you and explore how these could assist you?" | Shut-up Closing |
| "When can I come and see you?" | Shut-up Closing |
| "May I come and see you and look at your retirement situation to help make sure your retirement is handled right when you take on the responsibility." | Shut-up Closing |
| "I'm free next Tuesday, can I come and see you? Thursday afternoon is also open: | Alternative |
| "I'm busy until Wednesday; Thursday morning at 9:00am would be great for me. How's that for you?" | Shut-up Closing |
| "If it really concerns you, can I come and see you with some possible solutions to the issues you mentioned?" | Shut-up Closing |
| "When would it be suitable for an appointment Monday at 10am or Wednesday at 3:00pm?" | Alternative Close |
| "I'll call you in the morning to set a time, if that is okay with you." | Assumed Close |
| "I've got Thursday morning free, why don't we just do it? Is 8:00am okay for you?" | Direct Close |
| "Time is of the essence. We've only got one left. How about I see you this Friday so you don't end up missing out on the one you'd prefer?" | Urgency Close |
| "I'm heading out of town on Thursday for a week. Could I come and see you on Wednesday?" | Urgency Close |
| "Let me summarise what I've picked up. You need a partnership agreement, a personal Will, a plan for your retirement and dreaded disease coverage to begin with. I'd say we shouldn't wait. I'll come and see you Thursday morning." | Summary Close |
| "I had a gentleman by the name of Brad van Zyl and he had a similar situation to yours and we straightened things out for him immediately and got him home with less money as a down-payment. I'm confident we can do it for you also. Let's move on it!" | Similar Situation Close |



Exercise 2:

Utilising the 6 Step Format Approach write up two different approaches you could make on the telephone. Have two different reasons or focuses in reference to the appointment. At the end use a "Closing The Commitment Statement."

6 Steps	Focus #1 _____	Focus #2 _____
1. Clients name		
2. Respectful Opening		
3. Identification		
4. Bridging Statement		
5. Attention Grabber		
6. Exploration Question		
Now, use a Closing the Commitment Statement		

Turning Price Enquiries Into Customers

All companies get price enquiries. There are productive ways to handle the call to create business and there are non-productive ways which lose business. Lets look at a few points on handling price enquiries as part of using the telephone effectively.

- Do not give the price immediately. It is important that you create a value for the investment. Value could come in product features and benefits to the customer, or it could be points about your company that are known as your competitive edges.
- Get their permission for you to get the answers to a few questions! "There are several models of this product, which one were you thinking about?"... "Could you tell me what you are going to use it for?"
- Try and cover some of the competitive edges of your company as well as the product. "Are you familiar with the adjustable bed? Let me tell you a few things about it. Did you know that we have a delivery service and there is no charge?" The question approach is a good way to cover your strengths.
- Be very friendly and let them know how much you care that they get the right product. Use tips on buying that product. "When you are trying to decide which station to use, it is important that you define exactly who you are trying to reach, because different stations cater for different people. To get your best return, you should be on the station your potential customers listen to."
- Give them your name and ask for an appointment. Make sure you have their name, business, address and phone number and confirm a good time to meet with them. Make a note of it.
- Ask questions that steer the caller towards your store's strengths. "Mrs. Jones, did you know that when you buy our siding it has a lifetime guarantee?" After her answer you may say ... "and that is not all, our company has a special offer of 30% discount over the next month." Remember, you must paint a picture to go along with the price. If you do and your competition does not, you will get the deal.
- Thank them for calling and ask them to please not hesitate to call back if they have any more questions, or need some help. It is an opportunity to say you have had twelve years in the business, or that you are a buyer too and know how difficult it is at times to get the correct answers to make a wise purchase. Let them hang-up first.
- Tell stories about other customers ... people like to hear stories and it gives you the opportunity to cover a lot of the objections they may be going to put in front of you.

Note:

If you are talking to a client or potential customer who is in a hurry, knows you and your product well and needs a price ... then give the person the price. The above suggestions are not there to upset someone; they are there to make sure the client really knows what he or she is getting for their money.

Cold Phone Enquiries

These are people who call your business based on going through the yellow pages or they saw an advertisement or visited your web site.

The key to these telephone enquiries is to remember that you are not usually out to sell your product or service on the phone. You are only there to persuade the customer to come to your business, set up an appointment for you to go and see them or permission to fax or e-mail some details and follow up. Again, the objective is to develop some rapport and at least get their name, what they are looking for, their phone numbers, etc.

One way, I've seen people get the caller's phone number with ease was when they were with another customer and said "look, I am just finishing a transaction for a client, would you give me your name and telephone number and I will call you back in a minute?"

When it seemed difficult to get the number, they would say "let me just check with the customer and see if he may spare me a few minutes so that I can handle your enquiry right now. I am sure he will cooperate. He doesn't seem to be in a hurry" or "I can get him to fill out a few forms while I talk to you".

A few years ago, I (Bill Gibson) was interviewing Kean Williams, a very successful black Sales Manager and seller of Nissan motor vehicles, and Kean received a Cold Phone Enquiry while talking to Bill based on an advertisement in the paper.

The conversation went something like this:

Kean: "Hello. Kean Williams speaking."

Customer: "I am calling about the advertisement that you have got in the newspaper."

Kean: "Is it the new XYZ car ad?"

Customer: "Yes, it is!"

Kean: "Great, we have been getting a lot of calls on that ad. Were you calling for yourself or was it for someone else?"

Customer: "Calling for myself."

Kean: "That's good! Do you want more information?"

Customer: "Yes, I do."

Kean: "Are you at home?"

Customer: "No, I am not."

Kean: "What area do you live in?"

Customer: "The Germiston area."

- Kean:** "Which street do you live on?"
Customer: "Russ Street."
Kean: "I didn't catch your name. If you gave me your name and address, I could immediately have one of the staff drop off more details for you."
Customer: "I don't want someone to have to drive all the way to my house."
Kean: "That's okay! A couple of them are on the way out anyway and would be delighted to drop by."
Customer: "Okay."
Kean: "I just need your name ..., address ..., and phone number in case he gets delayed or lost. Also, I will get him to bring one of the cars so that you can see it and even drive it, if you like. Will you be looking at a trade-in?"
Customer: "Yes, I will."
Customer: "Okay."
Kean: "Also, if you like the car, he will have a simple form that you could fill out to get things moving. He should be there in thirty minutes."
Customer: "Thank you."
Kean: "I know that you will like the car. I am looking forward to meeting you."

The amazing part is that this was almost word for word and I was still there when the Sales person got back with the details and he said that lady really wanted to meet Kean because he was so pleasant and so helpful. Kean has a very friendly, non-obtrusive, way of talking with people, not necessarily to people. Talking "with" is more effective than talking at or to someone.

It is vital that you have pleasant mannerisms on the telephone. One suggestion is to put a series of answers to certain questions on a stand-up card near the phone and also certain points that you may want to make.

An example of what a person could do in the Motor Industry:

- Question:** "How much could you give me on a trade-in on my ... car?"
Answer: "It would depend on the number of kilometres on the car, the condition of the car and a number of other issues. If you bring the car in or I can come out and see the car, I could get a proper evaluation done."
Answer: "I have known some people get as much as X Rands on some as little as X Rands. It will depend on a number of issues." Etc, etc.
Answer: "We are really known for being more than fair with our evaluations. Why don't I set a time with you and I will make sure that our evaluator is available?"

Certain questions you may wish to ask are:

- "Do you drive a (your Brand) now?"
- "Have you dealt with our Dealership before?"
- "What made you call us?"
- "Did someone refer you to us?"
- "Are you aware of the special finance packages that we have right now?"
- "Did you know about our special demo promotion that is on right now?"

The phone is easy to work with if you have got the time to put that material together. These same questions with only a MINOR change can be used with Cold Walk-ins as well. In any Industry you could interview a few of the experienced people and see how they do it. It is amazing the knowledge that is around us, if we ask.

Summary

After reviewing this module and doing the exercises you will have accomplished the following:

1. Become more effective at Telephone Approaches and utilising the telephone on outgoing telephone calls.
2. Built a list of a Pool of Questions for specific Target Markets / Groups and developed two 6 Step Format Telephone Approaches.
3. Improved the handling of Incoming Telephone Enquiries.

To finish off this module please complete Exercise 3.



Exercise 3:

List 20 Questions that could steer an incoming caller to strengths or advantages of your business, product, service or doing business with you personally. Put those questions near the phone so you can see them.

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Module 6

Approaching & Uncovering Clients Needs

Learning And Sales Development Outcomes

In this module you will:

1. Learn about and do an exercise involving the 4 Different Approaches that can be used with Prospects and Clients.
2. Find out about the 9 Levels of Selling.
3. Know more about "Buying Motives".
4. Learn more about the 5 Types of Questions you can use when gathering information.
5. Discover the value of utilising a Needs Analysis.
6. Build the questions for your own Needs Analysis Form.

***Ntsika Enterprise Promotion Agency,
with a focus of rendering non-financial support to SMME's
is part of The Department of Trade and Industry in South Africa.
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assisted in the Initial Development of the
Boosting Sales & Profits With Focus Selling program
in conjunction with Knowledge Brokers International Limited.***

Module 6

Approaching & Uncovering Client Needs

Introduction

"You do not get a second chance to make a first impression"

Literally this is not a true statement, but it is a great statement to alert us to the importance of the impression we give when we meet someone.

Some people are phenomenal at immediately putting people at ease and opening up the conversation and building trust and rapport quickly.

"Module 4 – "Building Client Rapport" delivers excellent tips and skills for building rapport with people. What you learned in Module 4 about Personality Styles and Rapport Building is a good foundation for Approaching and Uncovering Client Needs. As a matter of fact the Rapport Building skills apply to any and every one-to-one or group meeting or encounters that you have.

In this module we will look at the five different ice breaking approaches a bit more closely than we did in the Telephone Approaches Module.

1. The Courtesy Approach
2. The Focus Approach
3. The Main Benefit Approach
4. The Whole Story Approach
5. The Formal Information Gathering Approach (The Needs Analysis Questionnaire)

This module is broken into three main focuses.

1. Breaking the ice through the many different approaches, greetings and introductions we can use.
2. Understanding the buying motives
3. Breaking the ice through formalised information gathering... The Needs Analysis Questionnaire Approach.

Let's first look at breaking the ice through the less formal approaches than the Needs Analysis.

Please keep an open mind as I discuss the approaches. You may read about an approach that is retail oriented and you may say that does not apply to you. **Think again!**

If you are having a cocktail party and you are greeting people you may or may not know, you may use exactly the same suggestions as for a retail salesperson who has people walking into his store.

Lots of outside salespeople are very good at setting appointments and walking into offices and opening the conversation, but when you put them into a trade show booth and they have to break the ice with people passing by, or when entering a room full of strangers at a business cocktail party, they are lost. The various approaches are used in all aspects of our life. See them that way. Communicating effectively is a lifestyle.

The Courtesy Approach

- An effective Courtesy Approach comes in the form of:
 - A sincere compliment.
 - A statement about something exceptional that both people would agree upon immediately.
 - A non-threatening courteous statement ended with a question.
 - An offer to help in the form of a question.

One of the most often used Courtesy Approaches in a retail store or at the front counters or desks of an office is; "May I help you?" Time and time again I hear managers and owners say to their staff, Do not ask, "May I help you?", because all you will get from the customer is - "I am just looking." Be innovative!

You see "May I help you?" works extremely well if someone is reaching for something and you offer to help by saying "May I help?". The answer will be "Yes, thank you". "May I help?" or "Can I help you?" is effective if the real situation demands it. The problem is that we become caught in the grooves or ruts of our mind and without thinking we unconsciously do and say the same statement to different people in different situations over and over again.

You can change this and become a more interesting individual. Think of the stewardess or steward who stands at the door of the plane as 200 people pass by as they go out the door and the stewardess says "Bye! Bye! to everyone. Think! Is it possible she could have a mixture of sayings, have fun saying them and come across as a more exciting sincere person? The answer is yes.

A few years ago when my "Boost Your Business In Any Economy" book was published by Ten Speed Press, I experienced, for the first time, being asked to autograph my book by about 40 different people in a line-up at the end of a seminar.

I had never autographed a book before. Guess what I wrote to almost every one of those people! It was either "God Bless" and my signature or "Good Luck" and my signature. Is it possible that I could have written this to a few people and written a dozen other comments to the others? The answer is yes!

I went home that night and brainstormed all the things I could write to people. I listed twenty or so statements. I studied them over and over again and the next time I had to sign the books I trusted my intuition and wrote a message I thought fitted the person and then signed it. What a difference. People felt the personal touch and I did not have three people walking away with the same message.

This was my list.

- Thank for your enthusiasm!
- You have got great energy!
- Good luck with your life!
- Keep up the good work!
- Thanks for the eye contact during the session!
- Your participation made a difference! Thanks!
- I hope we meet again!
- Stay loose!
- Keep your eye on the target!
- You can do it! Good luck!
- The world is a better place with you in it!
- Thanks for asking those questions!
- You are a lot of fun. Thanks!
- It was great meeting you!
- Thanks for being here!
- See you again!
- Cheerio for now!
- Cheers! It was fun!
- The world is your oyster. Go for the pearls!

Can you see the difference in impact? Believe me it became fun for me to watch and feel the reactions from people.

As a retail salesperson, a person working a trade show or someone just walking in to greet a client or potential client, make a list of things you can say that would fall under the courtesy approach.

A few of the standards are:

- How are you?
- Can I help you?
- It's a nice day, isn't it?
- Are you well? (South Africa)
- May I help you?
- Is there something I can do for you?

Courtesy Approach Alternatives

Following are some examples under the various categories of Courtesy Approaches.

A Sincere Compliment:

- "That is a great suntan. Just back from holidays?"
- "Wow! Your little girl has such big beautiful blue eyes."
- "That is a great suit you are wearing."
- "I like your antique car ... not many people own one of those."
- "Mr. Ramaphosa; you are getting great media coverage! That was a great article about you and the company in the Star newspaper."

An Exceptional Statement:

- "B-u-r-r ... It is a cold one today, isn't it?"
- "The traffic is really heavy today. Did it effect you?"
- "Boy, it is a scorcher today. It must be 35°."
- "You are from Cape Town ... you've come a long way for this trade show!"

Courteous Statement Ended With A Question:

- "I sure like the way you renovated your building. Who did the new design?"
- "You look great! You've lost a lot of weight. What is your secret?"
- "Congratulations on your recent promotion! Will you be moving to new offices?"
- "It is a beautiful day, isn't it?"

An Offer To Help In The Form Of A Question

- "How may I help you?"
- "Would you like to put your name in to win the "Home Entertainment System? (Trade Show)"
- "Is there anything specific I can do for you today?"
- "We've got great coffee. Would you like one while we are talking?"

The Focus Approach

This is where in most cases your statement will focus on a specific product, service, request, situation or reason for calling on them, or them coming to you, or you walking up to them and opening a conversation.

- "Are you in for the 40% off sale?"
- "Come in to our booth and try our lovely coffee and cakes."
- "There is a great sale on in the women's department. Do you want some details on what is happening?"
- "Mr. van Zyl, I'm Themba Kakana, ABC Brokerage calling to set up a time for your medical with our doctor."

- “So, what do you think of our new layout?”
 - “John, I came to see you because we have a new unit trust (mutual fund) that meets the requirements you insisted on four weeks ago.”
 - “My name is John Saxton and I am with ABC Realty. We have a client who wants to purchase a house on this street and there are none for sale. Would you be interested in selling if you could get the right price?”
 - “The reason I have come to see you today is because of the new “speed line” we have put together for realtors for fast approvals on mortgage bonds.”
 - “I am calling you today, Pete, because when you bought your car from me last month you asked me to keep an eye open for a used Toyota three to five years old for your wife. I have found a lovely one.”
- The Focus Approach allows you to cut through the nice things that could take time and get straight to the reason you are talking to the potential or present client. Your high action people “The Controllers”, especially, like to be approached in this manner. It helps you get straight to the point.

The Main Benefit Approach

The main benefit opening statement goes directly to a feature and benefit, or directly to the benefits. It usually elicits an immediate response from the client.

- “Mr Buku did you know that with one of our VIP Visa Cards you can access up to 5 000 in cash at anytime at over 20 000 instant tellers around the world? That means you are never stuck for cash or have to run to make closing time at the bank.”
- “I am here today because we have introduced a new “long distance” plan that will save you over 800 on your monthly phone bill.”
- “You may be interested to know that this satellite cellular laptop computer that we are highlighting here at the trade show, can transmit from anywhere in Africa and up to 300 km offshore. That means you can go anywhere and still have a mobile office and stay in contact.”
- “With our bank in the base of your building I wanted to come and see you because I believe that your people could save themselves and your company a lot of walking time by dealing with us. Also with the amount of overseas transactions taking place it would be like having an on-site expert because Marilyn from our office will take a lot of work off your hands.”
- “You know that car you are looking at will go from 0 to 100 kilometres and back to 0 in under 9 seconds. That kind of pick-up and braking could save your life.”
- “Our company makes Personal Computers right here in your city which means faster delivery and service from those who put them together. I wanted to talk to you about the benefits of dealing directly with the manufacturers.”

As you can see these actually focus the mind in a certain direction - towards a benefit or an advantage. Most of the statements ask for more than a yes or no.

The Whole Story Approach

The whole story approach could utilise the principles of any of the other four approaches. I am suggesting that by painting a picture with a more complete story, people will have more empathy and understanding, therefore positively responding more often.

- “My name is Paul Zolta, you do not know me but a year and a half ago I was a dentist like you, then unfortunately I had an unexpected accident. I lost the use of one of my hands. Overnight I lost my career. The fortunate side is that the previous month I took the time to meet with a disability insurance expert and put together a disability package. It saved the house my wife and children live in, insured that my children get an education and have given me a substantial monthly income. John I am now in the life disability insurance and financial investment business. I know the value of these things first hand, could I come and discuss some things with you?”

These sound a bit long winded, but in essence what it does do is grab the interest of the person you are talking to and leads them through to a conclusion. This one works well, especially on a cold approach over the phone in person, or even a letter fax or an E-mail.

- “Hi, Mr. Referral Source, my name is Steven Smith with ZYZ Company in Sandton, a Special Operation set up by ZYZ Company. I know that you do business with the Affluent Market and I am a Financial Consultant also dealing with the Affluent Market. The 21st Century being all about relationships – I’d like to meet you for 10 minutes and show how both our business can be supported. May I come and see you?”

An Approach In A Shopping Centre:

FA: “I do apologise for coming up to you and stopping you in Sandton City ... can I ask you a question?”

Prospect: “Go ahead.”

FA: “By the way my name is Steven Smith, I’m part of a “Special Operation” with ZYZ Company, called Operation Influence. The reason I say we are “Special” and the reason “why” we have opened up this operation, is because of a lot of changes with Legislation in the Financial Services Industry. The major change with Legislation is “so that you can be looked after and be given the correct advice for the correct reasons. I’d like 10 minutes of your time to see you – we’d love to have someone distinguished like you as a client. May I set an appointment to see you and tell you more about our operation and myself?”

The Formal Information Gathering Approach

(The Needs Analysis Questionnaire)

This approach is a powerful one. Let's take a close detailed look at the why's? and how's? of The Needs Analysis Questionnaire.

I spent several years in the broadcast industry selling advertising. Fortunately for me I was introduced to a tool called the "Marketing Questionnaire" early in my career. This tool was a major factor in me becoming a top producer in that field.

The marketing questionnaire I used at that time was a 12 page questionnaire that could extract all the pertinent answers needed to develop an effective advertising campaign for a business owner. Rather than attempt to sell the client advertising, I would sell the concept of another meeting at which time the two of us could explore his business in a way he probably had never done before. Most of the time the client would agree. After two hours of listening to how the business started, the types of customers he had, where they came from, what had and had not worked, his opinion on the other media and so on, we had developed a professional relationship. I would come back a week later with a recommended plan based on the data I gathered with the client's interest truly at heart. Over 85% of the time the client would accept the plan with minor changes. In three years I studied hundreds of businesses and became a marketing professional by listening to the people who were in the firing line.

Experienced business and salespeople think that they always get all the information they need - but they really do not.

In real estate, formal listening could be called a "Home Buyer Analysis", automobile dealers call it a "Driving Style Analysis", while camera stores could describe it as "Photo Shooting Analysis". This approach is extremely effective on large ticket items like Savings Investments, Life Insurance, Furniture, Travel or Long Term Relationships like Banking and Auto Rental, etc.

Financial Advisers and Financial Planners call it a Personal Financial Needs Analysis.

Approaching With This Process

Many salespeople and consultants and advisors use this approach to open up or advance the conversation or sales process. They introduce the Needs Analysis as a tool for doing a thorough client focused solution oriented job for the client. Often one of the other approaches like the Courtesy or Focus Approach is used in front of or in conjunction with the needs analysis approach. Following are a couple of examples of how a Needs Analysis may be introduced.

Personal Financial Planner (FA):

FA: "Mrs. Tambo, are you familiar with the new regulations governing the Financial Services Industry?"

Mrs. Tambo: "Sort of!"

FA: "The new regulations require me as a professional Financial Adviser to do a thorough Financial Needs Analysis with you to ensure that you receive proper advice."

Mrs. Tambo: "Yes, I've heard of that."

FA: "With your permission I'd like to ask you a few questions so I can come back to you with a proper Financial Plan and comply with the new regulations."

Mrs. Tambo: "Go ahead."

Management / Marketing Consultant:

"Mr. Pillay, we have found that it is impossible to make any kind of proposal or recommendation until we've put a couple of days into the clients business to see if and where there is a fit. While we are there we also make a few recommendations. This is done at no charge. We have some time in the next two weeks. Are you open to us coming in to your business?"

Cell Phone Salesperson:

"Mr. Myburg, I think you'd agree with me that just about everyone has a cell phone these days. Amazingly enough though, when we have the opportunity to look at how most people use their phone and for what reason ... most people don't have the cell phone and contract agreement that gives them a maximum return on investment of their time, energy and money. I've got a 20 question questionnaire that will help indicate the best phone and package for you. May I ask you those questions? It will only take a few minutes."

Motor Vehicle Salesperson:

Salesperson: "Mrs. Kuzwayo, were you aware that most people invest more in purchasing motor vehicles in their lifetime than they do a home?"

Mrs. Kuzwayo: "I never thought of it ... but you are probably correct."

Salesperson: "Well, what we've decided to do at this dealership is take the time to really help buyers find the right vehicle. We have a quick "Driver Analysis" Questionnaire that ensures you get the right vehicle. In it are questions like what are 5 factors about your present vehicle that you like and don't like, how many different drivers will drive the vehicle and how will they use it, and the amount of highway driving versus city driving? I'm sure your money is hard earned money, so if you have a few minutes to invest with me I'd be glad to get a few details from you that will make sure you are investing in the right vehicle at this time."



Camera Salesperson:

To help you make sure you are getting the right camera I'd like you to look at these twenty different uses for a camera and just select the top 10 in order of priority for you. Then I can review the points with you and we can make sure you get long term value for your investment.

Motor Vehicle Salesperson: (Quick Analysis Card)

To make sure that you invest that hard earned money properly and that I focus on what is important for you I'd appreciate it if you would select the top 5 things that are important to you in a vehicle on this Quick Analysis Card.

Note: The Quick Analysis card could be used as a frame of reference for you to build your own Quick Analysis Card.

Quick Analysis

Date: _____
 Clients Name: _____
 Telephone Numbers: _____
 Sales Professional: _____

What is important to this Client?

Number the top five in order of priority:

Warranties Braking Financing Visibility
 Acceleration Towing ability Highway handling Visual appeal
 Safety Room inside Room in the boot
 'State of the art' conveniences
 Other: _____

Quick Analysis

Date: _____
 Clients Name: _____
 Telephone Numbers: _____
 Sales Professional: _____

What is important to this Client? Product/Service: _____

Number the top five in order of priority:

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Other: _____



Exercise 1:

Put together 2 examples of approaches you can use with your clients or customers under the 5 Types of Approaches.

Approach Type	The Approach
Courtesy Approach	1. 2.
Focus Approach	1. 2.
Main Benefit Approach	1. 2.
The Whole Story Approach	1. 2.
The Formal Information Gathering Approach	1. 2.

The Written Approach

When writing a letter, a fax or e-mail, it is important to remember that you cannot immediately respond to a question or an impression or misunderstanding the receiver may have. You must carefully word your letter and pay attention to the detail in the letter to project a good image and stimulate the prospects interest. You can utilise the various types of approaches within a letter, memo, fax or e-mail.

The best uses of a letter, a fax or an e-mail are as follows:

- Contacting a top level executive who is usually not available on the phone or through cold calling.
- When several attempts have been made on the phone and in person without any success.
- When you are not sure of the proper protocol or proper person who may handle certain issues. You start higher up with a letter that may illicit a phone call from the right person through delegation. You may also do this when you want the top executive to be aware of what you have and hopefully create enough interest that he follows the progress.
- When you want to let the person know you will be calling on the phone or in person when you are in the area.

Reminders for writing the letter:

- Make sure the letter is going to the right person.
- Use the person's correct name, title and address. Check the spelling. If in doubt, ask your secretary or make a call yourself and confirm the name and title.
- Get their attention by focusing on significant industry problems.
- Focus on the person you are contacting and his or her company.
- Just as on the phone, use the person's name and company's name a few times. Don't over do it.
- Rule of thumb in the past is keep the letter short but if it requires several pages to explain why you want to meet and it is information that would interest and hold the readers attention you can go beyond one or two pages. Some direct mail marketing letters that sell products, subscriptions, etc. are as long as 12 to 15 pages. The letter leads people through an experience.
- Write in common everyday English. Do not lose them with jargon.
- State one to three reasons why both the company and the individuals could benefit by meeting with you.
- Enclose only literature that is pertinent. Underline and highlight key points in the literature that is directly aimed at the prospect.
- Get feedback from a third party on the clarity of content. Double check spelling. Read backwards when manually spell checking.

By taking a quick glance through the reminders it is easier to write a more effective letter. See the example on this page.

Mr. Frank Bonner
Director Of Operations
Prime Media
Box 1060
Sandown, Sandton, 2196

Dear Mr. Bonner

Do you and your company Prime Media face the challenges that many companies have today in trying to stretch your car allowance budget so you can get more for less?

At Parkwood Motors we have been aware of what recent changes in tax legislation have done to fleet buyers.

Over the last six months we engaged Price Waterhouse to explore all the options that corporations can use for buying and leasing cars and trucks. We have come up with the following:

Create ways that Prime Media can purchase more for less.

A guaranteed way Prime Media can get good resale value.

And a legal but effective way to get an even better tax benefit than previous years.

The information we have could eliminate a lot of headaches for you personally Mr Bonner, and free up some rands in your budget.

I know that in the next few months that your company will be ready to explore new options on new vehicles. Mr. Bonner I would appreciate an opportunity to share this valuable information with you and how Parkwood Motors could save you a lot of extra work and help you stretch that budget through buying creatively and our maintenance control system.

If I have not heard from you by Wednesday of next week I will be calling you to try and co-ordinate a mutual time we can meet.

Thank you for your time.

Yours Truly



Bill Gibson
Account Executive

P.S. I have enclosed an article written by our financial director for Financial Times. It covers some of the things I would like to explore with you.

Note: Sometimes a little creativity works quite well. Quite often a salesperson calls a client several times and does not get a call back. Remember, a full page fax has more impact than a small message on a telephone message sheet or one of 100 e-mails a person receives daily.

Preparation

Before we explore needs analysis selling and the how to's of questioning, requesting and gathering information in face-to-face client meetings, lets "step back" and look at a couple of areas that are important before having that meeting or even making that phone call.

These important areas are:

- Knowing who you will be meeting with, who are the decision makers etc.
- Know why you are going to see the Prospect or Client.
- What is the information you should know and what will trigger their interest?
- Understanding "Buying Motives" so you can recognise what buying motives will most appeal to the Prospect or Client.

Are You Prepared?

There is a saying. 90% Preparation! 10% Perspiration! I do not know if this is the exact ratio, but I know one thing! It makes a huge difference if you are prepared.

One time I had the opportunity to give a 2½ hour sales presentation to a group of high level executives and the training and human resources personnel of a large corporation in Johannesburg.

The following was in place before we made the presentation.

- A list of everyone attending the meeting
- The titles and functions of the key decision makers.
- Through my network I had a fairly accurate description of the personalities.
- I knew the market share percentage of that company and what their expectations were for the next year.
- A business associate of mine heard the Managing Director of the company give a speech a few days before and told me about it. From that speech I had a good handle on what that companies future direction was.
- I was aware of the challenges in that industry.
- I understood the ability of the client to pay and how soon they wanted to move on the issue.

Plus, I knew who was already on-side and just before the meeting found out how much latitude I had without stepping on toes in reference to giving my opinion of what the company needed to do.

I ask you what my chances were of impressing these people and doing business with them now that I had all this information and was able to tie in what their objectives were, with what we had to offer?

The chances were excellent. If I had not been prepared we might not have had the same level of success.

Even if you are in a business where absolute strangers walk in and buy from you, e.g. car dealers, Real Estate people, etc. what do you know about:

- Women
- Men
- Families
- Age groups (Demographics)
- People with different life styles (Psychographics)
- Buying motives of people
- How people are triggered to buy in reference to situations
 - A raise in pay
 - A specific car allowance
 - A Promotion
 - An addition to the family
 - Getting married

It makes a difference. The salespeople who are the experts in these areas are more prepared than those who are not. It does not matter who you sell to, "Preparation" dramatically improves the chances of how successful you will be.

Warming Up for the Call

There are 3 basic questions that need to be asked namely:

Who? Why? What?

This module will look at each of these in detail.

Who?

Identify the key person or key people who need to be contacted in the organisation, their titles and responsibilities. Asking questions like the following ones will make it easier to identify these key people.

- Who as an individual or department will be affected by a Yes or No decision?
- Who may want to block the sales process and why and when?
 - Financial Director?
 - Human Resources Manager?
 - Operations Director?
 - General Foreman?
 - Marketing Director?

- General Sales Manager?
 - Managing Director?
 - If you are selling to individuals it could be identifying who that person is, his/her age, sex, job, income level, etc. It also may be identifying which of two people who are married will carry the most influence or what each of them may want or need.
 - Identifying who will be at a meeting when you are gathering information, presenting or dealing with two or more people. Once again some background on these people will make an impact.
 - Who do you need with you as part of your team to enhance the meeting and add real value?
- This information is not just confined to calling on new clients. The common mistake made in selling is where we under prepare to talk to well-established clients. Each call to an established client is a new opportunity to possibly:
- Receive additional business
 - Do something to guarantee the client's loyalty.
 - Introduce something new in the future
 - Gather information for future selling, servicing and relationship building
 - Find new business through referral
 - ...to name only a few

Why?

What comes first, the chicken or the egg? It could be the egg or it could be the chicken. Who knows for sure?

The same question applies here. Sometimes you know you are going to call a certain individual, but you have not thought about why. So "why?" may come after "who?" Other times you may know why you are going to call on a company and then you have to figure out who you should see specifically.

There are many reasons to make a call. Most of them help to retain, develop, regain or gain business, but they are not necessarily at that time focused on getting the client or potential client to commit to buy.

Lets look at the various types of calls you might make.

- **Information Gathering Call**

This is where you are setting up a meeting or you make a call to gather information in order to present your products or materials properly. Completing a needs analysis questionnaire with a client would qualify as an information gathering call. To succeed in today's competitive environment you need to be a collector and analyser of information. This is where you qualify the client through a phone call or personal visit. The objective may be to see whether or not there is "a fit", and you can do business together, or maybe it is to categorise the client or potential client as an A, B or C client and how often they should be contacted, or what level of service they need. **Top producing salespeople are experts at qualifying and making decisions.**

- **Appreciation Call**

In this scenario you may be going to see the client or customer to say thank you, drop off a gift, give them a special invitation to a function or take them to lunch, etc. **The complete salesperson is also a public relations officer.**

- **VIP Call**

This is bringing an important support person/technical rep for a visit. Bringing a VIP from your company, from the industry or bringing an important business contact or someone of celebrity status to visit, would be considered a VIP call. **The professional salesperson is an important centre of influence for the client and a team leader.**

- **Courtesy Call**

This is a common one. This is where you drop in without anything specific, but rather as a courtesy. You may happen to be in the area, or you are going to be in the area and you want to drop in to say hi and see how the person is, how a family member is, to see their new offices, etc. **Top producers become friends.**

- **Education Call**

Your reasons for an educational call may be to drop off information that will help to explain how to use your product or to train someone. **Professional salespeople should be educators.** Remember if you educate the customer, you never have to knock the competition because the competition will often knock themselves when dealing with educated customers.

- **Problem Solving Call**

These are specific times you will be making a call to help solve a specific problem. **Salespeople must be good problem solvers.**

- **Conflict Resolution Call**

The professional salesperson often has to facilitate or handle conflict between the client and him or herself, between the client and another department in the salesperson's company and between clients and their customers where the salesperson represents the manufacturer or represents the source of the service. **The professional salesperson is also an excellent conflict resolver and a master of interpersonal communication.**

- **Credit Call**
A sale is not a sale until we collect the money. It is no good to sell to people who do not pay their bills. The salesperson plays an important role in the initial gathering of credit information, arranging financing, giving the terms of payment and in many cases collecting the money or assisting in the process. **As a top-notch salesperson, you are also a credit manager.**
- **Customer Audit Call**
This is the periodic official call to key clients to find out exactly how you, your company, your products, your services and your customer service as a whole are rated by the client. As a salesperson, especially handling key accounts you must be a customer service auditor. You cannot chance it to a part timer doing a routine phone call or a quick response form mailed to the client. **Be a professional customer service auditor with a customer focus.**
- **Business Gaining Call**
Without this call we will not have a business. This is the call where the salesperson is specifically going after the business. This is the use of rapport building skills, effective presentation, handling objections, negotiating, closing the sale and maximizing customer contact opportunities. **The professional salesperson is the master of selling skills, the master of influence and persuasion.**

What?

This is the kind of information you are looking for before you make the call.

Following is a list of the kinds of things you should know when selling “**b u s i n e s s t o b u s i n e s s**” in advance of a call, if possible:

- The Key Influencers .U s e r s , The Ruler, Navigator, Opposer, Protector, Contributor.
- Industry specific problems that the business or individual may be faced with.
- Common operational problems that the company may have.
- Specific problems or challenges that the company may face.
- Target customers and target markets.
- The firm’s desired image.
- Company’s position in the market place.
- Their geographical market.
- The key elements of the operating philosophy of the company.
- The company’s core technologies.
- Is the company growing, is it retrenching, producing substantial profits or losing money? Its commitment to growth and profitability.
- What competitors are they dealing with now? How is the relationship?
- What operational policies do they have? What purchasing policies do they follow?
- What are the systems and the equipment they use now? How new are they and how functional in reference to what you offer?
- If a present account, what is the history of the relationship?
- What is the timing in reference to what you are offering and when they may buy?
- What is the purchasing strategy? Is it annually, weekly, daily, etc.?
- Gather and review industry data and surveys pertaining to the client.
- What buying motives, events or situations could influence a positive response?
- What concessions do they expect?
- The history of the company, it’s directors, etc.
- Proper names, address, contact numbers, titles and so forth.

When selling to **individuals** the following kinds of information and questions gathered and answered in advance could improve your chance of doing business:

- What changes in the person’s life could enhance your chances for doing business?
- What kind of life style does the person have?
- What are the family size, income level, profession, geographic location and interests and hobbies of the individual? Also address, phone number, fax, E-mail, title, etc.
- Who does the person do business with now?
- What problems, situations and philosophies does the person have that may effect your presentation? A raise, a promotion, in between jobs, etc.
- Demographics, psychographics and buying motive information pertaining to the customer profile.
- Determine if possible where the person is in the buying cycle.
- Person’s financial situation.

Setting Your Objectives

Before actually making the phone call or personal visit, determine what your specific objectives for the call are. I would suggest that you make a guide list of those objectives. It may be wise to have a few hundred "Call Objective" pocket size cards drawn up so that you can put the objectives onto something you carry with you that day. Here are a few examples:

Call Objectives

Client: *ABC Electric*
Type(s) of Calls: *Information Gathering Call*

Objectives:

1. *Find out buying procedures.*
2. *Gather enough information to prepare for a more formal presentation.*
3. *Set an appointment for presentation to the decision makers.*

Figure 1

Call Objectives

Client: *XYZ Department Store*
Type(s) of Calls: *Business Gaining Call*

Objectives:

1. *Give a thorough presentation.*
2. *Sell an Ad feature. Newscast/Weather report.*
3. *12 Month contract for substantial advertising commitment.*

Figure 2

Call Objectives

Client: *Sampson Motors Inc.*
Type(s) of Calls: *Educational*

Objectives:

1. *Deliver new software package.*
2. *Teach key people how to use.*
3. *Set up a four step service program.*

Figure 3

These cards could be with you on the call. It would be simple to glance at the card to see if you have achieved your objectives.

Have all Information and Tools with You

The other thing is to make sure that you have the necessary tools or information to meet those objectives when making the call.

For example, you may want to have the following in place or with you on the call.

Figure 1:

- A list of questions already written out with spaces in between to write the information in, so that you collect all the information you need to make the formal presentation and to determine buying procedures.
- Optional dates for the appointment to give the formal presentation.

Figure 2:

- More than enough copies of the presentation for the clients.
- Know which newscast and weather reports are available for sale and testimonies to prove how well they work.
- Sales contracts with you for a possible 12 months commitment and the sale of the features.
- Request an overhead projector to present the information if they have one.

Figure 3:

- A checklist of what the software package contains and be sure everything is with you.
- Three copies of the "How To" Manual.
- A clear description of the four steps Service Program and your suggested timing.

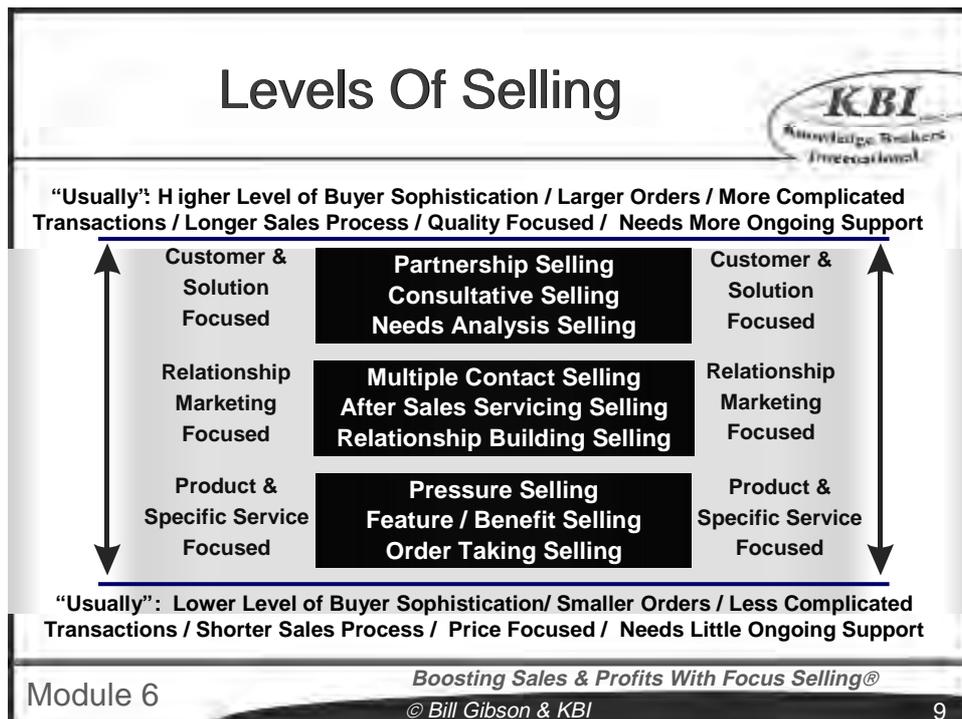
Review and Match

Review all the information you have on the client, determine as closely as possible the client's objectives or "hot spots", and match your presentation with the client's needs or objectives.

What Level or Levels of Selling will you use?

Earlier we talked about the type of call and now we will talk about the different levels of selling.

Let's review what is in the Levels of Selling.



In this Module there are nine levels of selling. These can be divided into three categories

- Customer and Solution Focused Selling
- Relationship Marketing Focused Selling
- Product & Services Sales Focused Selling

Let us look at each of these individually.

Lower Level: Product & Services Sales Focused

1. Order Taking Selling:

Order taking is a form of selling. This is usually where the client or customer calls in on the phone, faxes, e-mail, writes or walks in and says what he wants. It is usually a specific product or service offered by your company. It can also be the salesperson who regularly or systematically visits a client to take an order or fill the shelves with products, etc. It still is selling, but it is quite passive. Some persuasion abilities are needed, basic selling skills, a service mentality and ability to communicate. Preparation for the call may be to have a good stock of goods with you, catalogues, rate cards and the basics for taking the order or

calling in advance to see what is needed. A client who walks into a Mercedes Dealership, specifies exactly what he wants, is shown the car and buys, is order taking selling. It is still a small order compared to getting an order for 20 Mercedes for the executive of a company.

2. Feature Selling

This is where you have a product or service that you are selling and your whole focus is on the features of your product, service, company, etc. and how the client will benefit. The selling is absent of time invested with the client to design a package he or she needs, not doing a needs analysis, etc. This is where the client is not quite convinced he or she or the company needs this product or service and is persuaded through artful features and benefit selling. A professional feature/benefits salesperson has mastered the basic selling skills, communicates well, is a good negotiator. In a car dealership, feature selling would be when someone comes in, has not made up their minds on what to buy and through a features and benefits presentation the salesperson sells her a car and sells her on buying from that specific dealership.

3. Pressure Selling

A good example of pressure selling would be when I used to send two to four people into a town or small city sixty days in advance of launching a ten month Business Owner Training and Development Program. Over a ten month period, business owners would attend twelve to fourteen seminars with various speakers and have a business advisor visit them each month to help in the implementation of the concepts and ideas. The package was clearly defined and we had a limited time to sell. We would cover every possible prospect and present the features and benefits. Fifty businesses that enrolled in the program for ten months received 60 - 75% of the cost paid for by the Federal Government.

Because of the start date of the program being committed to in advance and the ceiling of 50 businesses allowed in the program, there was pressure to sell as quickly as possible and a pressure to buy. Some people think of pressure selling as something you should not be doing, when in reality pressure selling is appropriate in many cases.

Direct selling of encyclopaedias, vacuum cleaners, etc. is pressure selling, because the price of the item does not deserve dozens of calls. A manufacturer who decides to clear certain stocks at a special price by having the outside salespeople and the telephone people calling clients and making the offer is pressure selling as well.

Again, the salesperson must have all the basics of selling, communication and negotiation in place. Feature and benefit selling will most likely be combined with pressure selling.

A magazine advertising salesperson or a radio advertising salesperson who normally uses consulting selling, may use pressure selling when contacting clients to let them know there is a feature that has become available for sponsorship that will be running in the magazine or on the radio next month. There is only room for two sponsors. The buying is on a first come first serve basis. That is a consultative type person pressure selling. A realtor who advises a financial real estate investor on buying properties may use pressure selling when he lists a piece of property himself and he believes it is an excellent business venture to invest in. It would be appropriate to use pressure selling here if the realtor knew that someone else would grab the bargain and his investor client could lose out.

Middle Level: Relationship Marketing Focused Category

1. Relationship Building Selling

Relationship building selling includes all the activities that a salesperson may do and the skills that are used to enhance the relationship with the client. This is the utilising of:

- VIP functions
- Lunches/Dinners
- Sponsorships
- Newsletters/Personal Marketing Tools

...and other relationship building tools.

2. After Sales Servicing Selling

This is building business through creating customer loyalty and desire to buy more through super service. Consistent follow-up, client education, service systems, expectations - exceeding behaviours and cross functional team work are some of the methods and tools used here.

3. Multiple Contact Selling

A lighting salesperson who puts in bids and does presentations for new commercial buildings would be involved in multiple contact selling. On a specific project the lighting salesperson may work with the independent distributor for that area, while at the same time jointly getting the owner of the building, the architect and the contractor on-side for the buy. This takes tremendous organising ability, rapport building skills and personal marketing and the use of the basic selling skills. Most of the work is in specifying, relationship building and the co-ordination of several people moving towards a common outcome.

Higher Level: Customer & Solution Focused

1. Needs Analysis Selling

This is where the salesperson does a complete needs analysis with the client before presenting the product or service to the client.

For example, in banking, this is where the business development officer or the bank manager visits the client and extracts information that may help determine what can be done to help. This may be done through a structured needs analysis questionnaire or through a list of questions asked.

2. Consultive Selling

The client who is wanting to save money through energy-saving processes within an office building or manufacturing plant, may be a perfect client for the consultive selling approach.

A salesperson, along with a team of engineers who are the professionals in energy saving, may come in and look at the situation and give consultation and advice on the absolute best approach to saving money on energy saving tactics and processes.

In most cases this is where the salesperson and his team have developed such trust with the client that they are viewed as trusted advisors. In most cases the salesperson and his team are viewed by the client as much more knowledgeable in that area of business than himself.

A car salesperson that specialises in fleet management and is the absolute best in the industry would often use the consultive approach to selling. That person would be able to sit down with a client and show the following:

- Criteria for selection of a vehicle.
- Options in financing and the various ways to purchase within a budget.
- What the real costs of maintenance and operations would be.
- Options on resale and which would be the best.
- What to negotiate in reference to service and the warranties available and what to ask for.

A Financial Adviser structuring investments and insurance for a senior executive including off shore investments, would also be taking a consultive approach to selling because she would have to be viewed as an expert... hence she becomes a trusted advisor. She would utilise a Personal Financial Analysis and put together a Personal Financial Plan for the client.

The key to consultive selling is that the salesperson is viewed as a trusted advisor by the client. This comes through being knowledgeable, having unsurpassed experience, a credible track record and usually a perspective of the situation that the client could not figure out on their own.

3. Partnership Selling

Partnership selling is where the client and the salesperson and at times the sales support team join together to solve a problem and/or create an opportunity. **The client and the sales/service expert team work alongside each other without the traditional us versus them stance between salesperson and client.** Usually this type of selling has a longer sales process, is more complicated and is not straight forward.

As a broadcast sales representative I used to take a day or two of my time and sit in on the strategic marketing and advertising planning session and help them develop the best route to increase market share through advertising for the following year. This was partnership selling which is one level above consultive selling.

Partnership selling also means the use of cross functional teams.

Remember

Do not confine yourself to thinking that you may only be using one level of selling, you have nine levels of selling. It is possible to be using all nine levels in dealing with a client.

Once the client's account has been landed, the telephone order desk could be involved in order taking or you, the salesperson, could simply take an order in the future. At the time of finalising in which direction to go, features and benefits will probably have been used and if your support team only has a certain work window to help the client, pressure selling may be part of the close.

The initial trust may have been created through networking and relationship building tools and functions. In order to structure something that will work, you may have had to involve and orchestrate many people from various departments as well as outside resource people.

A "needs analysis" may have been part of the preliminary information gathering process which now brings needs analysis into the picture. Your internal experts got involved to advice exactly which direction the client should take in specific areas (consultive selling) and you worked closely as a partner to them to develop the whole package (partnership selling).

Keep your mind and options open when selling. A quick partnership approach on determining the options for an individual, could be combined with what initially looked like order taking selling. Even someone selling cars or furniture off a showroom floor should try and see how to utilise as many of these methods as possible that fit the situation. This is truly professional selling.

You can now see why levels of selling fit under **Approaching and Uncovering Client Needs**. By understanding the levels of selling you should use it is easier to determine what methods, tools and skills should be used.

Buying Motives

As a salesperson, it is important to continually consider the many buying motives that customers have. It is easy to fall in the trap of only using one or two. That can limit your results. Let's take a look at buying motives.

Selling To The Individual

When selling to an individual, or to an individual in a corporation, the buying motives sway more towards emotional reasons to buy. So understanding the individual's personality style and what may appeal to him or her most, is an effective way to sell. It is also important to know the person's own agenda. You may be suggesting to the printman of a company to buy a new machine that saves the company thousands but puts his job on shaky ground. You would need to show him how to better himself by showing the company



how to save with your plan. The softer more emotional buying motives get the individual moving towards a purchase in most cases.

Selling To The Company

When selling to a company there is often a group of people or a senior executive who will also put on a company hat. In their capacity as a buyer or an executive they will tend to buy for logical and practical reasons putting the company first. This does not mean that they will not have a tendency towards the emotional reasons for a purchase, but costs and return on investment, or an increase in profit, will play a dominant role in the purchase.

Buying Motives Summarised

Most Often With Individuals	Most Often With Companies
<ul style="list-style-type: none"> • Comfort • Convenience • Enjoyment • Admiration • Luxury • Good Health • Affection • Sexual Attraction • Good Food and Drink • Beauty • Good Housing • Personal Protection • Relief • Personal Security • Less Work • Safety • No Worry • Become More Attractive • Desire To Possess • Advance In Skill • Self-improvement • Style • Prestige • Recognition • Acceptance of Others • Achievement • Learning • Responsibility • Imitation • Feeling Together • Being An Individual • Feeling In Control • Feeling Complete Power • Doing Own Thing 	<ul style="list-style-type: none"> • Cut Costs • Save Money • Increase Profits • Increase Sales • Increase Productivity • More For Your Money • Long Term Results • Return On Investment • Long Wear • Guarantee • Prevent Loss • Protection of Assets • Lower Your Liability • Tax Break • Save Time • Gain Market Share • Quality • Accuracy • Control

The above list is not cut and dried because often, personal motives influence buying decisions in company purchases. Also with certain personality styles, the practical, logical motives make good sense to balance out your personal life. It is just that, when selling to an individual (shoes, suit, car, etc.) they do not have to answer to a board and justify the expenditure as often so the emotional side is easier to work with in individual cases.

Understanding Buying Motives

Let's review the most common buying motives for both individuals and organisations.

Profit Or Gain

This is where you show a buyer where they can increase or advance their profit, or save, or make money.

- "With this automobile you will save money on the lower amount of gasoline that it uses."
- "By putting this new system into your business you will see bigger profits because it will increase productivity but not cost any more."
- "This investment right here will help save on the amount of income tax you will pay."
- "By running this campaign you will grab (gain) market share."
- "We will turn those bond (mortgage) applications around within 24 hours." (Save time)
- "I would take the dark navy blue suit because research shows an increase in business done when someone wears a navy blue suit, instead of a brown one." (Increase or gain in closing ratios)

- “These tyres are made in such a way they will last 20% longer than the average tyre.” (Gain through longer wear)

Fear Of Loss

This is where the buying motive is triggered because of someone's concern about safety, having protection, loss of health or a loved one, future security, not wasting time, prevention of a loss or a need for a guarantee.

- “The consumer report says this is the most well built car on the road. You don't have to be as concerned about the safety of your family in this car.” (Safety, loss of loved one, having protection)
- “If something were to happen to you today what would the financial future look like for your family?” (Having protection for loved ones)
- “You should have insurance on this bond so that if something happens to you, your payments will still be made.” (Protection of property, future security)

Pleasure

People are inspired to buy based on things that can increase or provide pleasure. Included under pleasure would be:

- Comfort
- Convenience
- Enjoyment
- Admiration for others
- Luxury
- Sexual Attraction
- Good food
- Good Housing
- Beauty
- Affection
- “Based on what you have told me, you want comfort in a car. You are a tall person. This car here will provide the comfort you need on your long journeys.” (Comfort)
- “This home here is close to the school, one block from a supermarket, dentist, doctor and a 24 hour petrol station, plus there is a health club within a stone's throw.” (Convenience)
- “With our new on line banking system you can access your own bank account to monitor it daily... that is part of our new business package.” (Convenience)
- “If you take this car you had better be prepared for the women who will be staring at you at the traffic lights. It is a real magnet.” (Sexual attraction, admiration from others)

Avoidance Of Pain

It is amazing what most of us will buy or do to avoid pain. Included under the avoidance of pain is:

- Protection
- Relief
- Security
- Less Work
- Safety
- Good health
- No Worry
- Stay attractive
- Become attractive
- “Our representative comes to your house and does a complete analysis of your move and then the packers come in with specific instructions on what to do. We do 90% of the packing for you.” (Less work)
- “In this neighbourhood there are only two entrances and there are guards at each entrance. Your children can freely play in the neighbourhood. It is the most protected neighbourhood in the city.” (Safety, avoidance of pain of a loved one hurt)
- “As the consultant assigned to your brokerage I am here at least twice a day so I can take the details away from you and you can concentrate on getting more business.” (Relief)
- “This facial cream reduces the wrinkle lines by up to 90% in three months.” (Becoming more attractive)
- “Because of our pre-approved credit line for you, all you do is phone up and we have the money ready for you. You do not have to go through the application procedure each time.” (Less work, no hassle)

Pride

Pride moves a lot of people to action. It is one of the in-grained values in most societies. The following would be included under the heading of pride.

- High quality
- Newest fashion
- Prestige
- Recognition
- Desire to possess
- Advance in skills
- Self-improvement

Style

Beauty

- "If you decide to take the 8am newscast you actually own it. On the expiring of the broadcast contract you have first right of refusal. You own it, and no other company can buy it until you decide to release it." (Desire to possess)
- "Part of our package with this car is a full day driving course at the old airport where you become an expert driving in the rain and handling high speed skids." (Advance in Skill)
- "When we finish installing this system and training your people on it, you will have the best state-of-the-art system in the country and the best trained people as well." (Pride through self-improvement of people, advance in skill and the newest)
- "This new back-lit multi dimensional billboard is the first in the country. You company will be the first to use it." (Newest concept.)

Desire For Approval

Most of us are motivated by external factors such as approval from others. This includes:

Acceptance of others

Affection

Admiration

Imitation

Learning so we are accepted

- "If you want to fit in with the type of people you want to sell to, you need to be driving a car like this." (Acceptance of others, being part of a group, being approved of)
- "This product meets all the building codes plus it is the one that the city inspectors prefer." (Easily accepted, easily approved)
- "The classic cut actually puts this suit in the same class as the top of the line suits." (Imitation)
- "This is what all the state-of-the-art technical experts are using." (Imitation, being like someone else)
- "Along with the advertisement we will do a success story on your company in the magazine." (Admiration)
- "Once your people go through the training the company will be ISO 5000 certified and that automatically makes you an acceptable supplier to a huge market." (Approval through learning)

Self Actualisation

This is that feeling that you have arrived. It is a very high level of motivation. Included under self-actualisation could be:

Feeling together

Being an individual

Feeling complete power

Doing your own thing

- "The proposal I have just given you completes your financial future."



Products or Services	Buying Motives
1.	
2.	
3.	
4.	
5.	



Other Factors That Trigger A Buy

There are often other factors that go along with the buying motives that help trigger the buying process. By spotting these factors and situations you become aware of a need, want or desire. It is important to know what these factors or motivations are within your industry.

Examples:

- Someone just received a promotion
- Money has just been won or inherited
- There is an addition to the family
- Just bought a house
- Just moved
- It is a birthday or anniversary
- There has just been an amalgamation of companies
- There is a new executive team
- Someone has passed away
- The market has gone for a dive and business is tough
- Centralising or decentralising of a company
- New budget year coming up
- A land mark. A 50th anniversary or 21st birthday
- A wedding
- Move to a new building
- Just secured a major contract or was awarded a huge project
- Share price dropped
- Has decided to start exporting
- News headline that scares people
- Special time of year - Christmas, Easter, Valentines Day, Summer Vacation
- A heavy snow fall
- A heat wave
- A cold snap
- A new face
- A new law
- A change in government
- A new growth trend
- A market switching quickly from one item or system to another
- Person or company reaching a different status level
- A new competitor has moved on to the scene
- Someone recently started a business
- A new area is being developed
- Someone recently got fit, lost weight, new look
- A celebration e.g. Big sports win!
- A company has lost its position in the market place
- A company has gained a higher position in the market
- Government de-regulations of crown corporations
- A natural disaster
- A crime wave
- A huge event ... Olympics, expo, world cup etc.
- An industry boom - tourism
- Someone received poor service from a competitor

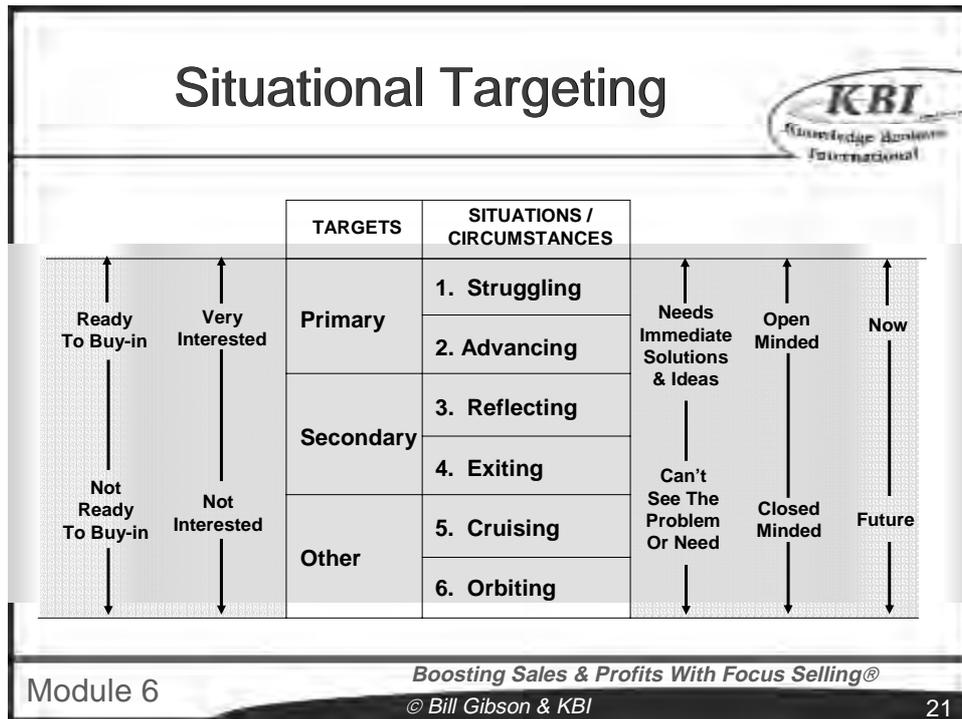
As a salesperson it is important to have that sales opportunity antenna up at all times. This way you can take advantage of right timing. Right timing means you have caught the client at a time of high need, high want or high desire. At these points they buy much quicker and much more easily.

Exercise 3:

Write down 3 factors or situations that often trigger a client to decide to buy what you sell. Review the list above.

1.
2.
3.

Situational Targeting



Often you hear sales professionals talk about timing and how it affects whether or not someone may buy. The level of potential buyer's buy-in is greatly impacted by that person's personal or business situation or circumstances. The Situational Targeting Model can help you the salesperson.

Following are some important points under each of the 6 types of situations and circumstances.

1. **Struggling:**

An individual or company, who is struggling, has problems, hurdles and challenges usually needs immediate solutions and ideas and they want it now. They are more open minded, will show a high level of interest and are obviously ready to buy-in to a solution that can help them. This group fits under the Primary Group. They are often your best point of entry and become your quickest allies and supporters.

2. **Advancing:**

Those that are advancing, growing and wanting more, also fit into the Primary Group. They are open to anything that can fill those industrious objectives. Again if you get these people on side they will actually help sell or drive your idea, product or solution. Show them how to get ahead with your solution. This includes companies or departments that are advancing.

3. **Reflecting:**

People that are at a point of reflecting, contemplating or in the process of introspection are also on the upper side of being open minded, interested and quite ready to look at solutions and directions. The process of reflecting means they are analysing and looking. Reflecting fits in the Secondary group because the openness and quickness to buy-in is not quite at the level of those Struggling or Advancing. Companies can be in a Reflection State of Mind.

4. **Exiting:**

Someone that is in the process of retiring, being transferred, being promoted etc. don't usually have as much at stake in the current situation or present department they are in. It is possible they may want to leave their mark, or make a grand exit, so they are open to a certain level of buy-in but may not be interested in championing an idea, concept or purchase. Those that are in a situation of Exiting fit into the Secondary group. Companies can be Exiting e.g. Mergers, takeovers etc.

5. **Cruising:**

These people are on automatic pilot. Things are moving along quite well and they are not too eager to "rock the boat". And "if it isn't broken don't fix it" philosophy prevails. It is much tougher to get their immediate buy-in or even to gain a "listening ear" from them. Those who are Cruising fit into the Other Group and are part of the least likely to buy-in group. A company can be Cruising also.

6. **Orbiting:**

This group can often be overly optimistic about their present situation and abilities. They can be arrogant and "cock-sure" and literally be closed minded to your solutions. It is tough for them to want to look at solutions when they can't even see the problem. Those that are Cruising or Orbiting are not usually the first people you want to focus on. Companies can be orbiting as well.

This Model helps you determine where best to put your energies and determine your strategies.



To eventually bring an Orbiting individual on side it may require the influence from an individual who is Advancing and has the credibility to get the Orbiting person to listen. It is important to note that with Cruising and Orbiting individuals and companies, that consistent helpful follow-up usually gets you in the door. Sooner or later their feet will hit ground.

Asking Questions, Requesting, Interviewing And Gathering Information

The Power Of Questions

80% of your vital information will come from 20% of the questions you will ask. Think clearly about which questions and requests are the most important ones and then review them and change them until they flow and will easily illicit a vital answer from a potential or present client.

It demonstrates that you are a professional. You are competent. You have asked an intelligent, thought-provoking question. This also builds trust. When you are putting in time with someone and being helpful, the time and genuine assistance model kicks in, which then equals a relationship of one degree or another, which equals trust and a commitment from both parties.

We will explore 5 different types of questions and requests that you can utilise when gathering information.

They are:

Closed Questions

Open Questions

The Request

Leading Questions

Directive Questioning

Closed Questions

Closed questions can only be answered with either a “yes” or a “no” or with an “either” “or”. Closed questions are commonly used to acknowledge or confirm an understanding. They are also used to direct a conversation towards a certain point. Be cautious as to when and how frequently you use closed questions. If used incorrectly the conversation can be turned into an interrogation. Closed questions would start with words like, Do? Did? Can? Are? Has? Have? Etc.

- Should we meet at your office or mine?
- Was the service satisfactory or unsatisfactory?
- Do you need to sign before the end of the financial year? Yes No
- Was the report on time? Yes No
- Did you enjoy the presentation? Yes No
- What time would be best, 10:00am or 11:00am? Yes No
- Can we go ahead and sign the paperwork? Yes No
- If I understand you correctly, are you happy with delivery tomorrow? Yes No
- Has this always appeared to be the problem? Yes No
- Have you considered this model? Yes No
- Are you married? Yes No
- Is your will updated? Yes No
- Has this happened before? Yes No

Open Questions

An open question is exactly that. It is an open ended question allowing the person to go many directions with the answer. Open questions usually utilise words like Who? What? Where? Why? When? Which? Etc. They are used to gather information and select opinions. Whether the answer is a single word or a long descriptive answer. Try and soften the questions or request with a soft lead-in.

Soft Opener

Open Question

- | | |
|---|--|
| I'd be interested to know | ... <u>how</u> you feel about the new procedures |
| Could you tell me | ... <u>what</u> it is that you are not happy about in the way you were handled |
| Please share with me | ... <u>why</u> you decided to switch companies |
| I'd appreciate knowing | ... <u>what</u> it is about that car that you prefer |
| May I ask | ... <u>when</u> do you drive the car the most |
| Please clarify for me | ... <u>who</u> is responsible for your printing |
| I can be of more help if I knew | ... <u>where</u> you are currently filing that information |
| You obviously have a good reason for doing it | ... <u>why</u> are you currently considering changing banks |
| It could speed things up if I knew | ... <u>when</u> you are considering buying a new car |

It is obvious that you would not put a “soft opener” on the front of every open question. The above examples indicate how “soft openers” can be used. If you used all the open questions without the “soft openers” it could sound more like demands and an interrogation.

The words you put an emphasis on and the voice tone and body language can change the meaning of any of these open questions. If you are a fairly aggressive blunt person you should probably use “soft openers” as much as possible. We’ve listed below the same open questions without the “soft openers”. You can see the effect if none of them have “soft openers”. Remember if you are a Controller Type Personality, you would be more okay with the direct non-soft approach than the Supporter or Promoter. The Analytical would appreciate a non-threatening direct request but in a soft voice tone.

- How do you feel about the new procedures?
- What is it you are unhappy about in reference to the way you were handled?
- Why did you decide to switch companies?
- What is it that you prefer about that car?
- When do you drive the car the most?
- Who’s responsible for your printing?
- Where are you currently filing that information?
- Why are you currently considering changing banks?
- When are you considering buying a new car?

The “soft openers” do make a difference.

The Request

This is not a direct question, but a request. Words commonly used would be Tell Me, Explain or Describe.

- Share with me your thoughts about how that should be changed.
- Tell me more about your experience with the call centre.
- Explain the process to me so that I can fit in.
- Describe for me what a satisfactory solution would be.
- Expand on that point for me.

Remember:

7% of effectiveness is in the words we use
23% of effectiveness is in the tone of the voice
35% is in the facial expression, and
35% is in the body language.

Once again, sometimes it is not the questions or the words, it is what you emphasise and how words sound when you ask the question that determines its effectiveness in reference to a response.

Leading Questions

Leading questions are used to guide the conversation commonly based on an assumption. If the speaker or questionnaire’s assumption is correct you may get a “Yes”. If not it will allow an explicit description of some sort, allowing the speaker to share lots of information. The leading question is similar to open questions, but lead or guide the response towards a specific conclusion, direction, assumption or response type.

Examples:

- “Would you agree with me that it is important to get the medical completed before the end of the month?”
- “If I were to get the additional information to you by 3:00pm, can we agree on me getting an answer by 3:00pm, tomorrow?”
- “Can you see how this process will save both you and I time?”
- “Tell me how this will positively affect your Practice?”

Directive Questioning

How often have you seen someone who is chairing or facilitating a meeting ask the question, “Are there any questions?” and nobody asked questions.

What if they said, “think for a minute, based on what Bill has said, if you had the opportunity to ask Bill personally one question about selling face-to-face with a client, what would that question be? The mind goes where you point it and it naturally searches out information if the direction is clear enough.

At the end of reviewing a sales proposal or giving a group presentation, the salespeople often say, “So, what do you think of what we just presented?”. Often there is very little response or a negative based response. Directive questioning changes that. Read the following examples and see how much more effective it is compared to “Are there any questions?” or “What do you think?”

Example:

- “From the presentation we just gave you, what would you say would be the one thing that would be most helpful in your department?”
- “Tell me, what you saw here that would easily fit into your present situation?”
- “Lets take a moment and see if we can come up with 3 different ways to finance this project. Jot down any ideas that come to mind, even if it seems a bit foolish, the foolish one’s often have the ingredient that can lead to a whole different set of solutions.”
- “Share with me what you liked or felt comfortable about in reference to this presentation.”
- “What specific three things are your competitive advantage over the competition?”
- “If you were to move forward, how would you think your people would implement this within your group?”

Directive questioning can give phenomenal returns in meetings, one-to-one meetings as well as during and after presentations.

Soft Openers

We are supplying you with a list of “soft openers” to assist you in questioning, requesting, interviewing and gathering information.

Examples:

“May I ask ..”

“Could you share with me ..”

“I’d be interested to know ..”

“Please clarify for me ..”

“You obviously have a good reason for saying that .. share with me ..”

“It would help me if you explained ..”

“I can be of more help if you would answer a few questions ..”

“It will speed up the response time if you can tell me ..”

“I need your help to get Thabo on side, could you ..”

“Help me understand how you came to that conclusion.”

“Help me get a handle on what you are up against ..”

“What am I missing? Connect the dots for me.”

“I think we are on different pages ... explain that for me so I can get the picture.”

“I feel like I’ve come in half way through an event ... can you take a minute and give me an overview.”

“I’m a little lost. Help me see how this applies to ..”

“I don’t have all the answers. I need your input in order to ..”

“Please give me your view.”

“What advice do you have for me ..”

“I need your direction on this ... how do you ..”

“Obviously you are not happy with the situation. What specifically is bothering you?”

“I’d like to hear more about what happened ..”

Listening For Results

The following suggestions can help make your information gathering and interviewing much easier and effective, especially when utilising a Needs Analysis, Consultative Approach to Selling.

- Integrate your questioning, requesting and information gathering with all 5 Types of Questioning.
- Have a pool of questions to draw from for different situations and different groups of people.
- Have and use a different number of soft non-threatening openers when questioning and requesting.
- When you are listening, listen to “how” they are saying what they are saying.
- Ask people to clarify. For example, if someone says that he wants fast service from a representative, ask him what “fast service” means to him. This encourages you not to assume you understand what the customer means by fast service. When you clarify, it is easier to target your presentation and meet the clients request.
- As the client speaks, you do not have to write every word. Write trigger words, circle things, put stars by them, underline important points, write “important” beside certain things. This helps you remember where the emphasis should be at a later date.
- Record and be aware of important facts that you may utilise later to make a point. Try to get sources where possible, e.g. “That is an interesting fact, I would love to have the source of that one!”
- Listen for ideas and record them.
- Try not to jump to conclusions about one statement. Save it to the end to make a conclusion. Never, ever, ever get excited about an answer then immediately move to directing or selling the client on a product, service, idea or concept. Make a note and use it when you present after you have gathered all the information. Very important ... when doing a Needs Analysis Questionnaire.
- Focus ... do not drift with your thoughts. Keep eye contact.
- Match the person’s body language, tone of voice and facial expression.
- Avoid jumping ahead of the client, slow down and listen carefully.
- Put an effort into listening - stay awake and full of life.
- Get comfortable and stay flexible. Every once in a while drop the pen, chat and listen.
- When gathering confidential information, always let the client know you do not expect her to share the information and it is okay if she does not, although it will make your job easier ... and know why just in case she asks how will it make it easier.
- In an interview it is not expected that you should only gather information. There are times you will give input, do a little educating and give an answer to a client’s question. The key is to gather information, not to dominate the session with sales points and your opinions. This is a great way to discipline yourself to learn how to listen.
- Where several people are involved and you are into complicated information, a tape recorder could be appropriate if the client feels comfortable.
- Where you sit, can make a difference. If possible try to get the client to sit at a neutral table rather than at his desk. The needs analysis is designed mainly for face to face contact, but if both you and the client are committed and you are too far away to have a face to face meeting, you could complete a needs analysis on the phone. A good way to start is to phone up a few friends and complete an analysis on the phone. You will be surprised how well it works.

- I do not recommend giving a Needs Analysis Questionnaire to the clients to fill out. It requires some questioning, exploring, paraphrasing and listening by you. It is not just important to ask questions and look and sound intelligent. The real reason you are doing it is to gather the absolute best information to do an excellent job for the client and build a presentation that the client finds it impossible to say no! Remember, if your intent is only to get the information so you can sell something, you will not do as well as when your intent is to see how you can help by really hearing and collecting what is being said.

Benefits Of A Needs Analysis

Following are the benefits of utilising the Needs Analysis Approach to doing business.

- The Needs Analysis Questionnaire, done properly, focuses you the salesperson, on listening. Most salespeople would rather talk.
- The client/customer explores areas about him/herself or their company that they might have neglected. It means the customer thinks.
- Pertinent questions by the salesperson are not missed because they are sitting in front of the salesperson and the Needs Analysis questionnaire/survey.
- If the questionnaire is well designed it comfortably leads the client into more sensitive and confidential areas like financial information.
- Sufficient information is gathered to enable a salesperson to intelligently consult the customer/client as to what to do or buy. Genuine assistance is accomplished.
- The suggestions and sales points will often be tied to a specific point made by the client during the questionnaire. It is easier to hit a target if you know where it is!
- You truly break the ice because of the extra time and the listening. You build phenomenally close relationships.
- You have a record for future use of everything that was said.
- Support people can also utilise the information to help develop proper solutions and service the client properly.
- It shows the client that you are truly a professional and that you have taken the time to structure a questionnaire tool that can really help him/her.
- The salesperson gets a real education from the "real business world" and/or from real people living real lives rather than from books, statistics, seminars and "hear say". The Needs Analysis allows you to get into the details, experiences and opinions about what the customer has done, what he/she is doing now and where he/she wants to go.
- Through proper usage of the "Needs Analysis Questionnaire?" technique, you benefit by uncovering the customer's:
 - Likes
 - Dislikes
 - Fears
 - Joys
 - Challenges
 - Problems
 - Achievements
 - Dreams
 - Goals
 - Objections
 - Values
 - Beliefs
 - Motivations...to name only a few.

The Needs Analysis Questionnaire is a great way to really get to know your customer. Once you know your customer you can easily see the win/win solutions and opportunities for both him/her and yourself.

When you discover you really cannot help someone after you have completed a Needs Analysis Questionnaire you have to make a decision to follow your personal integrity. At that time you suggest the customer buys something different from what you are selling or you direct the customer towards another company to buy from. This is where the customer views you as a true professional. When you do something like this, customers do not forget. They tell others and they come back or bring others to you.

I must say I have not had to refer business elsewhere very often when I have used this approach. For example, when I sold broadcast advertising I was always careful to only work through a marketing questionnaire with those who had the ability and need to buy. If I am selling advertising for a Radio Station whose main audience is 12 - 25 years old I will not put in a 2½ hour session filling out a marketing questionnaire with a senior citizen retirement home.

The time would be better invested with a chain of jeans stores or pizza stores. With a tool that requires a large investment of your time and the clients, be selective who you utilise it with.

A car salesperson may ask how he knows whether or not he has a potential buyer when he just meets someone in the showroom. My answer is, "The person has come to you." She can see it is a Toyota Dealership. People do not come to dealerships for their health. Also if you clearly describe what you want to do and why, and the benefits to a serious buyer you will get a positive response from most of them. The so called "tyre kickers" or "looky-looky's" will decline your offer. For those that don't, you have had good

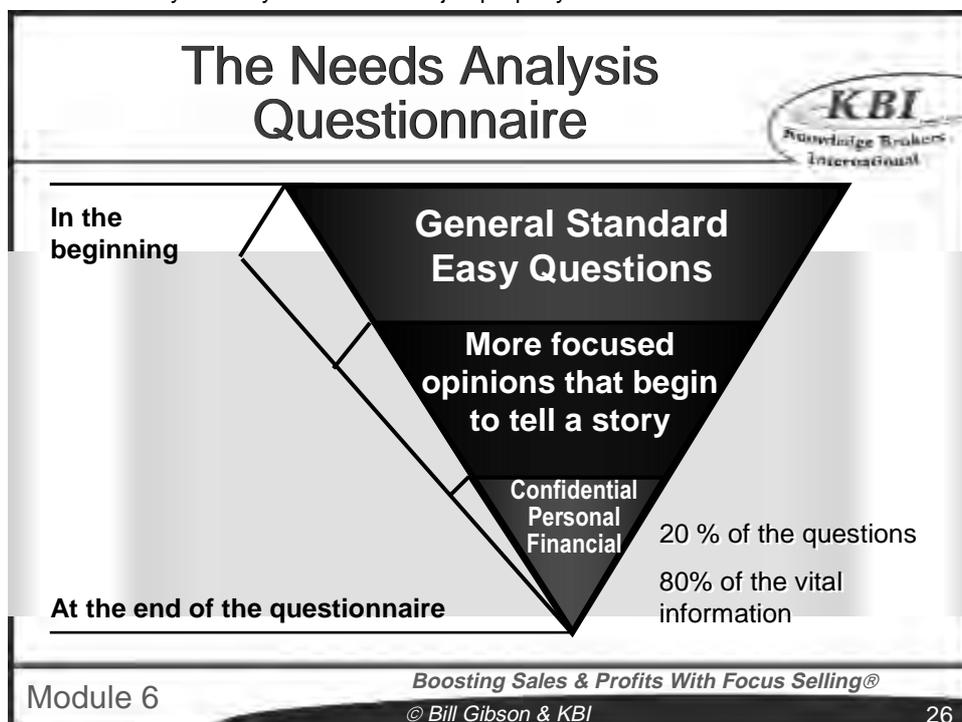
practice and the least you will get is a positive relationship with a potential future buyer and possibly referrals.

Constructing And Utilising A Needs Analysis Questionnaire

To put together a Needs Analysis Questionnaire and utilise it properly, you need to know your industry well or have someone help you, who does. Over and above the previous benefits mentioned, the main idea behind the needs analysis is to structure a series of questions that a client or potential client will:

- Feel like answering.
- Actually have to contemplate and re-look at how he/she is doing things, thinking or thinking about doing things in reference to the subject.
- Build even more respect for you as a competent professional.
- Get excited about hearing what the recommendations are or get inspired to get involved with you to come up with solutions, directions or buying decisions.
- Build your Needs Analysis Questionnaire so that in the beginning you have easy, general, standard questions that helps the client and you get comfortable with each other. Then, you move to more focused opinions that begin to tell a story. It is towards the end, when you have now established better rapport that you gather the more confidential, personal and financial information.

80% of your questions help build rapport and fill in the gaps. The vital 20% of the questions will give you 80% of the information you really need to do the job properly for the client.



Have a cover page that gives the questionnaire an official look.

- Also have a place for the date, and who is doing the questionnaire. This is important in case it gets misplaced and you will also know exactly when the information was gathered. A periodic review and update with the client is important in fast changing markets and changing business.
- Gather standard business information for future use. Take the time to be accurate with spelling, etc. When you write letters or give the individuals a proposal you can use this as your information resource.
 - a) Physical address is important for using couriers, as well as visits by you and other personnel, or in this case describing it in the advertising.
 - b) Postal address for billing, letters, etc. Postal code important for couriers in some countries.
 - c) At least two contacts. Often the interview will be done with two or more people.
 - d) Name, title, phone number, fax number, e-mail number and cell number. If you get these from the client with permission to use them, you will save time.
 - e) Personal assistant and phone number. Get to know these people and treat them well. They have a big influence and do most of the work.
 - f) Have room for additional comments.

We are leaving you with two examples of a few Needs Analysis Questionnaires.

We often recommend that you have two or three versions of the questionnaire. They could be:

- A "Comprehensive" or "In-depth" Questionnaire
- A "Brief" Questionnaire
- A "Quick Analysis" Questionnaire

Naturally, where you need in-depth information and the client will invest the time you may use the "Comprehensive" or "In-depth" one. If it is a "Once-off" Client it may be the "Quick Analysis" Card like the example we showed earlier in this module.

The Sample Questionnaires are:

1. The "Brief" Buying Analysis For Individual Vehicle Buyers – This is a quicker version and could be used in a 10 to 20 minute period with a willing potential customer in the salesperson's office or with a clipboard in the showroom.
2. The Confidential "Concise" Client Marketing Questionnaire – A more concise version to be used with smaller clients and where time is a problem.

The "Brief" Buying Analysis For Individual Vehicle Buyers

Because this tool will be used quite often with people you have just met we left the questions like name address, etc. until the last. You will naturally get the person's name within a few minutes but I would suggest you leave the more official information until the last.

An opening statement and explanation of the Brief Buying Analysis may go something like this.

Salesperson: "Thinking of buying a new car?"

Customer: "Yes, I am."

Salesperson: "Do you know exactly what you are looking for?"

Customer: "Not for sure!"

Salesperson: "Well, I am sure I can help you."

Customer: "OK."

Salesperson: "Here at XYZ Vehicle Sales we are doing things a little differently from the other people in the industry."

We have discovered, as most car buyers have, that the average car owner will often invest more in buying cars in a lifetime than buying a home. As a matter of fact, in some countries a one time buy of some cars costs more than a one time buy of some houses.

Whatever type of car you decide upon, it is equal to many months of hard earned money. If you were thinking of investing that money you probably would sit down with a financial advisor who would collect the proper information and help you decide on your best way to invest."

Customer: "You are correct!"

Salesperson: "See normally, what would happen in a situation like this, is that I would show you a few cars and eventually one may appeal to you. You take it for a drive, we start to negotiate and eventually we agree and you drive away with the car. But three months later you may feel you moved too quickly and possibly did not get the exact car you wanted.

What we have done here, at the dealership, is design a Brief Buying Analysis for individual vehicle buyers. It is designed to help us be more professional and help you select the right car. The questions for example are: "What are the five factors about your present or last vehicle you owned that you like and why do you like these factors?" "What are the five factors you do not like?" These are important questions to which we need answers.

It would take 10 to 15 minutes and it could be quite profitable to invest this little bit of time.

Customer: "OK."

Important

A salesperson who has all the information of a Needs Analysis documented, and who has built a trust during the interview, can direct the customer to a more acceptable possible buy than one who does not have the information. Over time all these questions become automatic and you will be able to complete 80% without the actual form.

Use a Form or Questionnaire as much as possible. The official look enhances your professional image.

By the way, if in a Car Dealership a client does not want to take the time to do this, you would thank him and carry on showing him/her around, but ask many of these questions. The questions will help even informally.

Summary

In this Module you will have done the following:

1. Learned about the 5 Different Approaches you can utilise with Prospects and Clients.
2. Discovered there are 9 Levels of Selling and would see which level you most often sell at.
3. Completed and Exercise on what the "Buying Motives" would be for customers buying specific services or products from you.
4. Learned the 5 Types of Questions you can use.
5. Built the questions to develop your own Needs Analysis Questionnaire.



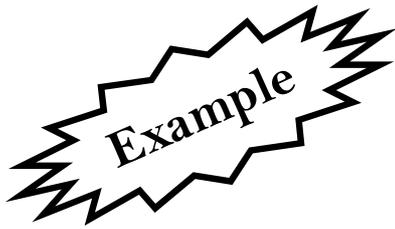
Exercise 4:

As you look through the two SAMPLE Needs Analysis Questionnaires make a list of all the questions you would like to have on a Needs Analysis you could use with a Prospect or Client. After doing that prioritise the questions in order of how you would ask the questions. Remember, start with easy general questions and end with the more personal, financial and confidential information. Once you've done this exercise design a Comprehensive Questionnaire, A Concise Questionnaire and A Quick Analysis Card Questionnaire.

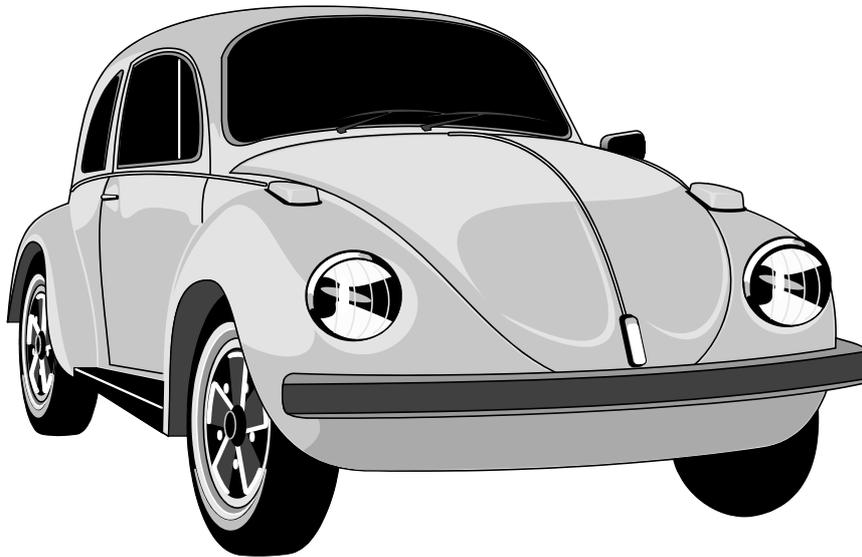
Needs Analysis Questionnaire Questions	Order
1.	
2.	
3.	
4.	
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10.	
11.	
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**The Brief Buying Analysis For
Individual Vehicle Buyers**



**To be used on the showroom
floor when you don't have
time to do a more in-depth
analysis**



People often invest more in the vehicle in a lifetime than they do in a home. I am sure your money is hard earned money, so if you would like to take a few minutes, I would be glad to get a few details from you that will help make sure you are investing in the right vehicle for you at this time.

1. Is this a purchase:

- Out of your personal pocket
 Car Allowance
 Company buy and you select
 Other _____

Comments: _____

2. Do you plan to buy today or in the near future?

3. Do you have a specific vehicle in mind at this point?
 Yes No

If Yes, what manufacturer, model and year? _____

4. Why is it that you have a preference for this vehicle?

5. What are five factors about your present or previous vehicle you owned, that you like and why do you like this factors?

Vehicle Factors	Why
1. _____	_____
2. _____	_____
3. _____	_____
4. _____	_____
5. _____	_____

Comments: _____



6. What are the five factors about your present or previous vehicle you owned that you do not like and why?

Vehicle Factors	Why
1.	
2.	
3.	
4.	
5.	

7. With your new vehicle, what percentage of time would you be doing:
 Town/City Driving _____ Rural Driving _____
 Highway Driving _____ Off Road Driving _____

8. How many kilometres per year would you expect to put on your vehicle?
 Under 15 000 15 000 to 25 001 25 001 to 40 000
 40 001 to 60 000 60 001 and more

9. How long will you keep this new vehicle? _____

10. Would you be kind enough to rate the following in order of importance. 0 will mean totally irrelevant. 10 will mean absolutely vital. Just circle the number.

Specific Colour	Choice 1	_____	0	1	2	3	4	5	6	7	8	9	10
	Choice 2	_____	0	1	2	3	4	5	6	7	8	9	10
	Choice 3	_____	0	1	2	3	4	5	6	7	8	9	10
A Boot/Trunk			0	1	2	3	4	5	6	7	8	9	10
Hatchback			0	1	2	3	4	5	6	7	8	9	10
Lots Of Boot/Trunk Room			0	1	2	3	4	5	6	7	8	9	10
Four Door			0	1	2	3	4	5	6	7	8	9	10
Two Door			0	1	2	3	4	5	6	7	8	9	10
Lots Of Leg Room			0	1	2	3	4	5	6	7	8	9	10
Lots Of Head Room			0	1	2	3	4	5	6	7	8	9	10
Leather Seats			0	1	2	3	4	5	6	7	8	9	10
Cloth Seats			0	1	2	3	4	5	6	7	8	9	10
Vinyl Seats			0	1	2	3	4	5	6	7	8	9	10
Adjustable Back Support			0	1	2	3	4	5	6	7	8	9	10
Reclining Front Seats			0	1	2	3	4	5	6	7	8	9	10
Folding Back Seats			0	1	2	3	4	5	6	7	8	9	10



Power Seats	0	1	2	3	4	5	6	7	8	9	10
Power Locks	0	1	2	3	4	5	6	7	8	9	10
Power Windows	0	1	2	3	4	5	6	7	8	9	10
Air Conditioning	0	1	2	3	4	5	6	7	8	9	10
Security System	0	1	2	3	4	5	6	7	8	9	10
Comfortable Seat Five Adults	0	1	2	3	4	5	6	7	8	9	10
Comfortable Seat Six Adults	0	1	2	3	4	5	6	7	8	9	10
AM/FM Stereo	0	1	2	3	4	5	6	7	8	9	10
Disc Player	0	1	2	3	4	5	6	7	8	9	10
Tape Player	0	1	2	3	4	5	6	7	8	9	10
Tinted Windows	0	1	2	3	4	5	6	7	8	9	10
Excellent Visibility	0	1	2	3	4	5	6	7	8	9	10
Front Wheel Drive	0	1	2	3	4	5	6	7	8	9	10
Rear Wheel Drive	0	1	2	3	4	5	6	7	8	9	10
Four Wheel Drive	0	1	2	3	4	5	6	7	8	9	10
Anti-Skid Lock Brakes	0	1	2	3	4	5	6	7	8	9	10
Power Brakes	0	1	2	3	4	5	6	7	8	9	10
Disc Brakes	0	1	2	3	4	5	6	7	8	9	10
Mag Wheels	0	1	2	3	4	5	6	7	8	9	10
Automatic Transmission	0	1	2	3	4	5	6	7	8	9	10
Manual Shift	0	1	2	3	4	5	6	7	8	9	10
Low Gasoline Consumption	0	1	2	3	4	5	6	7	8	9	10
Fast Pick-Up In The City	0	1	2	3	4	5	6	7	8	9	10
High Speed Cruising Ability	0	1	2	3	4	5	6	7	8	9	10
Leasing Plan	0	1	2	3	4	5	6	7	8	9	10
Financing	0	1	2	3	4	5	6	7	8	9	10
Cash Purchase	0	1	2	3	4	5	6	7	8	9	10
Good Trade-In Value When You Sell	0	1	2	3	4	5	6	7	8	9	10
Low Monthly Maintenance	0	1	2	3	4	5	6	7	8	9	10
Towing Package	0	1	2	3	4	5	6	7	8	9	10
Valuable Warrantee Program	0	1	2	3	4	5	6	7	8	9	10
Good Attitude Of Salesperson	0	1	2	3	4	5	6	7	8	9	10
Excellent After Sales Service	0	1	2	3	4	5	6	7	8	9	10



17. A few details and we have got this wrapped up. What is your

Name: _____

Profession: _____

Title: _____

Employer: _____

Address: _____

Personal Address: _____

Business Phone Number: _____ Business Fax Number: _____

Cell Number: _____ Res. Phone Number _____

Estimate Age Category: 16 - 20 21 - 25 26 - 30 31 - 40

41 - 50 51 - 60 60 +

Sex: Male Female

Spouse/Partner: _____

Estimate Age Category: 16 - 20 21 - 25 26 - 30 31 - 40

41 - 50 51 - 60 60 +

Profession: _____

Number of Children At Home: _____

Number:	1	2	3	4	5
Ages:					

Pets _____

Thank You!



The ABC Decision Maker

Absolutes

What are the aspects or qualities that must **absolutely** be present in the vehicle or with the dealership, manufacturer or salesperson in order for you to buy?

The Absolutes	
■	■
■	■
■	■
■	■
■	■

Beneficials

What are the aspects or qualities that would be **beneficial** to have?

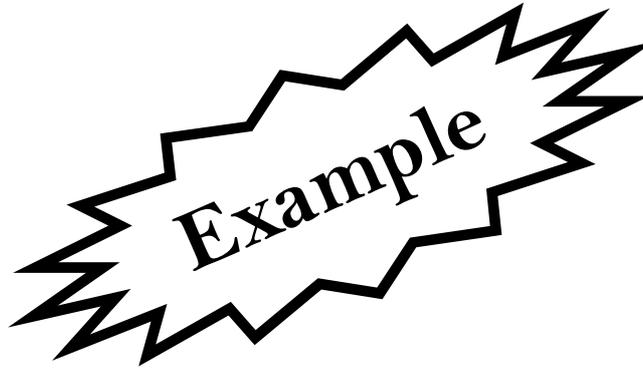
The Beneficials	
■	■
■	■
■	■
■	■
■	■

Convenience

What are the aspects or qualities that would be **convenient** to have?

The Convenience	
■	■
■	■
■	■
■	■
■	■

**Confidential
Concise Client
Marketing Questionnaire**



Example

C101FM



CONFIDENTIAL CLIENT MARKETING QUESTIONNAIRE

Date _____ Account Executive _____

Company Name _____

Physical Address _____

Postal Address _____

	Contact 1	Contact 2	Contact 3
Name			
Title			
Phone Number			
Fax Number			
E-Mail			
Cellular Number			
Personal Assistant			
Phone Number			
Comments:			

1. Who in your company has the major Influence on advertising expenditures?

2. Do you utilise an advertising agency or a media buyer? If so who?

Name: _____

Contact: _____

Phone No.: _____ Fax No.: _____

Physical Address: _____

Postal Address: _____

3. What business are you in?



4. The 80/20 rule. 80% of a companies sales and/or profits usually comes from 20% of the products and services/categories/profits centres, etc. From those big producers could you prioritise them and guess at what percentage of the 90% volume each would produce.

Number 1:	_____	_____ %
Number 2:	_____	_____ %
Number 3:	_____	_____ %
Number 4:	_____	_____ %
		100% of the 80%

5. Could you expand on why each of them does the volume that they do and how profitable they are?

Number 1:	_____ _____
Number 2:	_____ _____
Number 3:	_____ _____
Number 4:	_____ _____

Boosting Sales & Profits With Focus Selling



6. Now, lets identify the details in reference to your customers:

Product/Service Dept./Branch Store/Profit Centre	Customer Breakdown		Demographic Breakdown				Psychographics Income Levels, Profession, Education, Hobbies Etc.	Geographic Race Likes	Additional Observation
	Female:	%	Women	Men	Couples	%			
Priority Number 1:	Male:	%	Teens						
	Couples:	%	18-24	%	%	%	%	%	
	Other:		25-34	%	%	%	%	%	
			35-44	%	%	%	%	%	
			45-54	%	%	%	%	%	
Priority Number 2:			55+	%	%	%	%	%	
	Female:	%	Women	Men	Couples				
	Male:	%	Teens	%	%	%	%	%	
	Couples:	%	18-24	%	%	%	%	%	
	Other:		25-34	%	%	%	%	%	
Priority Number 3:			35-44	%	%	%	%	%	
			45-54	%	%	%	%	%	
			55+	%	%	%	%	%	
	Female:	%	Women	Men	Couples				
	Male:	%	Teens	%	%	%	%	%	
Priority Number 4:	Couples:	%	18-24	%	%	%	%	%	
	Other:		25-34	%	%	%	%	%	
			35-44	%	%	%	%	%	
			45-54	%	%	%	%	%	
			55+	%	%	%	%	%	
Priority Number 4:	Female:	%	Women	Men	Couples				
	Male:	%	Teens	%	%	%	%	%	
	Couples:	%	18-24	%	%	%	%	%	
	Other:		25-34	%	%	%	%	%	
			35-44	%	%	%	%	%	
		45-54	%	%	%	%	%		
		55+	%	%	%	%	%		

Boosting Sales & Profits With Focus Selling



7. Can you tell me which months, days and hours are your best selling times and what portion of business they give you. Prioritise. E.g. Best **1**, Worst **12**

Months			Days			Monday - Friday Hours			Saturday Hours			Sunday Hours		
Month	Priority	%	Days	Priority	%	Hours	Priority	%	Hours	Priority	%	Hours	Priority	%
Jan			Mon.			6 - 9am			6 - 9am			6 - 9am		
Feb			Tu.			9-11:30am			9-11:30am			9-11:30am		
Mar			Wed			11:30-2pm			11:30-2pm			11:30-2pm		
April			Thurs.			2 - 4pm			2 - 4pm			2 - 4pm		
May			Fri.			4 - 7pm			4 - 7pm			4 - 7pm		
June			Sat			7 - 10pm			7 - 10pm			7 - 10pm		
July			Sun			10 - 12pm			10 - 12pm			10 - 12pm		
Aug.						12pm-2am			12pm-2am			12pm-2am		
Sep						2 - 6 am			2 - 6 am			2 - 6 am		
Oct														
Nov														
Dec														



8. What are your most important annual events, sales, time of year, and why? List in order of importance. E.g. Christmas, Easter, Valentines Day, Holidays, Super Save Fridays, Anniversary, etc.

Event	When	Why Is It Successful
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		
10.		
11.		
12.		



9. Do you have an advertising slogan(s) or advertising statement(s) that you are known for? What are they?

10. Do you have special company logo's for print, jingles for radio or T.V. image packages? What are they like (theme, etc.)?

11. Whose advertising, radio or T.V. commercial or newspaper ads, etc. impress you the most and why?

12. Could you tell me what your top 5 strengths are and your top 5 weaknesses are as a business. Look over the list to trigger your thoughts.

- | | | |
|--|--|---|
| <input type="checkbox"/> Location | <input type="checkbox"/> Business hours | <input type="checkbox"/> Supplier partnership |
| <input type="checkbox"/> Parking | <input type="checkbox"/> Quality products | <input type="checkbox"/> Co-op budget |
| <input type="checkbox"/> Price | <input type="checkbox"/> Discount products | <input type="checkbox"/> Growth trend |
| <input type="checkbox"/> Selection (breadth) | <input type="checkbox"/> Guarantees | <input type="checkbox"/> Our data base |
| <input type="checkbox"/> Stock depth | <input type="checkbox"/> Delivery | <input type="checkbox"/> Innovative |
| <input type="checkbox"/> Buying power | <input type="checkbox"/> Super service | <input type="checkbox"/> Traditional |
| <input type="checkbox"/> Years in business | <input type="checkbox"/> Credit terms | <input type="checkbox"/> No name brands |
| <input type="checkbox"/> Promotions | <input type="checkbox"/> Merchandising | <input type="checkbox"/> Staff |
| <input type="checkbox"/> Image advertising | <input type="checkbox"/> Business name | <input type="checkbox"/> Management |
| <input type="checkbox"/> Sale advertising | <input type="checkbox"/> Distribution system | <input type="checkbox"/> Brands |
| <input type="checkbox"/> Convenience | <input type="checkbox"/> Community involvement | |

Strengths	Weaknesses
1.	1.
2.	2.
3.	3.
4.	4.
5.	5.



13. Could you tell me why each of these strengths are a competitive advantage?

1. _____

2. _____

3. _____

4. _____

5. _____

14. What are your two top competitive disadvantages and why?

1. _____

2. _____

15. What are your three biggest challenges as a business right now and why?

	Challenge	Why
1.		
2.		
3.		



16. If you could change three things about your business or the market place to increase business, what would they be and why?

	Change Wish	Why
1.		
2.		
3.		

17. Could you determine for me what position you have in the market place with your top four products/categories/profit centres, etc. List the names of the competitors and where they are positioned along with the clients name.

	Priority 1	Priority 2	Priority 3	Priority 4
Description				
Top Position				
Bottom Position				
Comments				



18. What are the top five strengths and weaknesses of your competitors?

Competitor 1: **Name:** _____

Strengths	Weaknesses
1.	1.
2.	2.
3.	3.
4.	4.
5.	5.

Competitor 2: **Name:** _____

Strengths	Weaknesses
1.	1.
2.	2.
3.	3.
4.	4.
5.	5.

Competitor 3: **Name:** _____

Strengths	Weaknesses
1.	1.
2.	2.
3.	3.
4.	4.
5.	5.

19. Are you presently advertising (Yes or No). If Yes, who with?

Yes No _____

20. What have the results been?

21. Have you used Radio in the past? (Yes or No). If Yes, who with?

Yes No _____

22. What were your expectations?



23. Describe the results?

24. Would you use radio advertising again? Why or why not?

25. What percentage of your advertising budget do you invest in the following:

Television:	_____	%
Newspapers:	_____	%
Radio:	_____	%
Magazines:	_____	%
Outdoor:	_____	%
Direct Mail:	_____	%
Flyers:	_____	%
Other:	_____	%
		100%

26. What percentage of your gross income do you set aside for advertising per year?

27. What made you decide on that figure?

28. What do you determine as a budget year in advertising?

From: _____ To: _____

29. During which months do you make the major decisions on your advertising for the following year or quarter, etc.?



30. Could you indicate the top five reasons for advertising over the next twelve months and why? (Option 5 - 10)

- | | |
|---|--|
| <input type="checkbox"/> Build store traffic | <input type="checkbox"/> New positioning |
| <input type="checkbox"/> Build store image | <input type="checkbox"/> Sell products/services immediately |
| <input type="checkbox"/> Educate customers | <input type="checkbox"/> Promote new merchandise |
| <input type="checkbox"/> Gain new customers | <input type="checkbox"/> Move old inventory |
| <input type="checkbox"/> Expand demographics | <input type="checkbox"/> Name awareness |
| <input type="checkbox"/> Expand psychographics | <input type="checkbox"/> Community support |
| <input type="checkbox"/> Expand geographic market | <input type="checkbox"/> Advertise regular price merchandise |
| <input type="checkbox"/> Promote location | <input type="checkbox"/> Support sales team |
| <input type="checkbox"/> Promote new store | <input type="checkbox"/> Off set negative image |
| <input type="checkbox"/> Balance the competition | <input type="checkbox"/> Special sales/events |
| <input type="checkbox"/> Build brand awareness | |

Reasons For Advertising	Why?
1.	
2.	
3.	
4.	
5.	

31. By what kind of percentage increase would you like to increase sales this year in your business:
 _____%

32. What would that translate into in reference to actual money?: _____



33. In order to suggest what we think could be achieved monetary-wise in increases this year and what we could do to help in that area we would appreciate it if you could trust us with actual financial figures in two areas: Gross sales per month and amount invested in advertising. We do not need to know about profits. We realise this is a sensitive area so we are comfortable with you refusing this request if it goes against your company or personal confidentiality policy.

Gross Income	Advertising Budget	Gross Income	Advertising Budget
J		J	
F		A	
M		S	
A		O	
M		N	
J		D	

34. What are the commitments or behaviours you like to experience from a media representative like myself who handles your business?

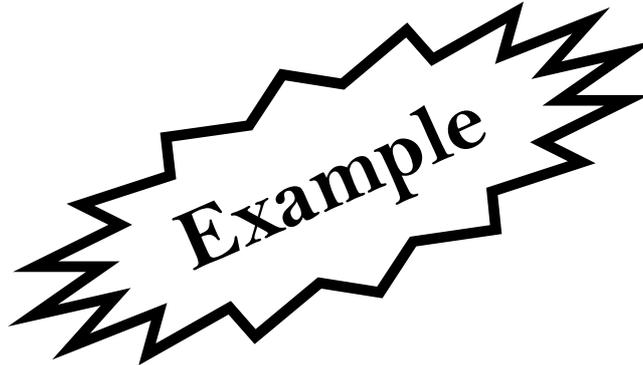
1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____

35. What commitments and behaviours would you like to see from our radio station as a whole and from management, as one of our valued clients?

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____

Thank you for your co-operation. I will get back to you by _____ with a complete presentation on what I believe we can do to make your advertising more effective, increasing sales and profits.

Fleet Management Analysis



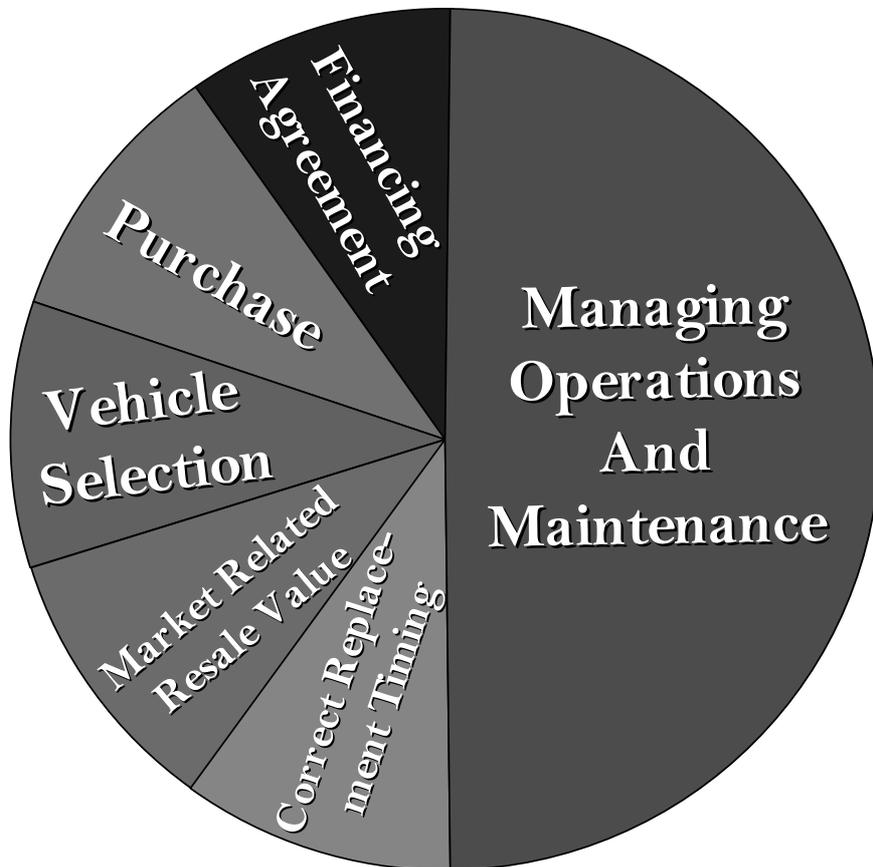
Developed By:

Mike Cranshaw
Yuishin Fleet Management
4 Sixth Street, Wynberg
P O Box 4265
Randburg, 2125
South Africa

Tel: (011) 786-5570 Fax: (011) 887-9293

Mike Cranshaw is a trainer/consultant in the area of Fleet Management. For complete training of your Sales Management and Sales Team in the area of Fleet Management and/or for the development of a Complete Fleet Management analysis tool, you can contact Mike Cranshaw at the above address.

Profitable Fleet Management



The Four Year Fleet Management Cycle

‘H ow To Get Your Fleet Of Vehicles To Definitely Go That Extra Kilometre/Mile.’



FLEET MANAGEMENT ANALYSIS

Client Information

Salesperson's Notes

1. Company Name: _____
 Address: _____

 Postal Address: _____

 Contact: _____
 Title: _____
 Phone Number: _____ Fax Number: _____
 Cell Number: _____ E-Mail: _____
 Management: _____

2. Fleet Size Information: Overall Size: _____
 Cars _____ MCV's _____
 LDV's _____ HCV's _____
 Locations:
 1. _____ Vehs _____
 2. _____ Vehs _____
 3. _____ Vehs _____
 4. _____ Vehs _____
 5. _____ Vehs _____
 6. _____ Vehs _____
 7. _____ Vehs _____
 8. _____ Vehs _____
 Other Locations: _____

3. Management structure for fleet. (Simple organisation chart)

- Who reports to who?
- Buyer
- Maintenance Control

4. Selection:

a) Current Mix By Model And Number:

Vehicle	Model/Year	Numbers
Cars:	1.	
	2.	
	3.	
	4.	
	5.	
	6.	
LDV's	1.	
	2.	
	3.	
	4.	
	5.	
	6.	
MCV's	1.	
	2.	
	3.	
	4.	
	5.	
	6.	
HCV's	1.	
	2.	
	3.	
	4.	
	5.	
	6.	

**Salesperson's
Notes**

b) Selection: Criteria Used:

Executives: _____

- Engine size
- Model
- Body
- Status
- Fuel
- Accessories
- Manual/Auto
- Tyres, etc.



Middle Management: _____

Essential Users: _____

c) Method Of Employer Choice:

Executives: _____

Middle Management: _____

Essential Users: _____

Manufacturers Exclusions: _____

**Salesperson's
Notes**

- Selector List
- Lead Car
- Lead Price
- Etc.

5. Purchasing: Current Method Of Purchasing:

6. Replacement Timing:

Category	Year Periods	Kilometres
Executives		
Middle Management		
Essential Users:		
LDV's		

Other Criteria/Problems: _____

7. Maintenance: Current Method Of Maintenance:

8. Expense Management:

a) Current Method Used To Control Expenses:

b) VAT - Analysis awareness of VAT implications for current car schemes:

Salesperson's Notes

- Dealer preferences
- Responsible manager
- Frequency

- Fleet cards

- Fleet Cards
- Report distribution
- Accountability
- Budget controls
- Internal system/ computer
- C/km, cost/trends
- Driver responsibility
- Operating costs available



Salesperson's Notes

9. Fleet Policy And Administration Analysis - Current Fleet Policy Being Use:

- Company cars
- Car allowance
- Perks tax
- Policy written/ distributed
- Driver instruction
- Car committee
- Periodic reviews

10. Disposal (Re-sale): Current Method Of Disposal:

- Trade-in
- Auctions

11. Financing Arrangements: Current Financing Method(s):

- Off balance sheet needs

12. Insurance: Current Method of Insurance:

- Driver training

13. Eligibility: Current Methods Of Allocating Vehicles:

Executives: _____

Middle Management: _____

- Lever of usage



Salesperson's Notes

Essential Users: _____

Pool Cars: _____

14. Private Use: Current Controls Used:

15. In brief indicate fleet owners needs:

- Weekends
- Lower payments
- Restructuring for tax

16. Action Required	By When
_____	_____
_____	_____
_____	_____
_____	_____

Sales/Liaison Executive: _____	Date: _____
Reviews Done By: _____	Date: _____
Comments: _____	



Module 7

Presenting The Solution

Learning And Sales Development Outcomes

In this module you will:

1. Know how to differentiate between Features and Benefits.
2. Complete an exercise on defining Features and Benefits for your products / services, yourself and your company.
3. Improve your skills when 2nd Person Selling.
4. Receive a Complete Checklist on presenting to a Group.
5. Find out how to make your Written Proposal more effective.

***Ntsika Enterprise Promotion Agency,
with a focus of rendering non-financial support to SMME's
is part of The Department of Trade and Industry in South Africa.
Ntsika, along with the support of The European Union
assisted in the Initial Development of the
Boosting Sales & Profits With Focus Selling program
in conjunction with Knowledge Brokers International Limited.***



Module 7 Presenting The Solution

Features And Benefits

It is vital that a salesperson truly understands the difference between features and benefits and be aware during verbal and written presentations whether or not he or she is utilising both to the maximum. It is easy to get into the habit of talking features and assume the client will understand or see the benefit. Do not chance it. Spell out the benefits. It is benefits they buy not the features.

See next page.

When you present a feature you may want to say something like this:

- “and what that means to you is...”, or
- “how you benefit from this is,” or
- “because of this feature you will...”, or
- “because of that you can expect to...”

A way that I remind myself to expand on the benefit is that after I mention a feature I may silently say to myself as if I am the customer “so what...?” or “What does that do for me?” It helps put me in the customers’ shoes and I have to think more about what that means to the customer.

Remember to try and personalise the benefit. Let’s look at some examples of features of products and services and what benefits these features may have to a potential client or customer.

Feature(s)	Benefit(s)
It is made of plastic	Light in weight and easy to handle. Saves you time and energy when handling.
We are located right here in your city	Fast delivery and you can preserve cash because you will not have to carry inventory. We will be your warehouse, thus saving you the overhead.
I have worked in your industry before	You get a rep that understands deadline issues and can set up systems to see that you get everything on time.
It is turbo charged	The car will pass quickly. You could avoid an accident by darting in quickly.
You become a bank VIP customer	You do not waste time standing in line. You get personal service in the office.
I have been in the business 21 years and have been the top Realtor for the past 4 years.	My experience and contacts gives me excellent financial resources to put together a package to help buyers to buy, plus I have my own long list of investors and that could mean a buyer very quickly. Your house will sell more quickly.

Exercise 1:

Whenever presenting the feature of a service, product, about yourself or about the company, it is vital to show the customer the benefit of those features. List two features and several benefits to the customer in reference to your product / services / yourself and the company.

a) **Services / Products** _____

Features	Benefits To The Customer
1.	
2.	



Exercise 1 –C ontinued

b) About Yourself

Features	Benefits To The Customer
1.	
2.	

c) About Your Company

Features	Benefits To The Customer
3.	
4.	



Important Points When Accentuating Benefits

Focus on the most important points - do not confuse the customer with overkill. Only where there seems to be a real interest should you expand on those areas.

If you are working with many items or services, work in threes to narrow it down quickly. For example:

- “Do you want something in the high, medium or low price?” Then if the person says medium, the question may be “which style, traditional, contemporary or early American?” Continue the process until you are down to a couple of options.
- Before showing a customer a product or presenting a service, explain to her what to look for. This way she sees the “strong points” that really suit her needs. For example:
- “When you try on this jacket you will notice how light it feels and how the lining makes you feel cool.”
- “... See how light and cool it feels ...”
- “As you are going through this presentation keep in mind how flexible it is and how it meets the needs of a new employee and that of an experienced employee.”

Handle your product in such a way that features are accentuated. For example:

- Hold a set of crystal wine glasses in a delicate way.
- Hold an expensive pair of shoes like a prize trophy.
- Sit in an expensive car in a slow comfortable way and start the car as if you were getting ready to fly a beautiful aircraft.
- Turn the pages of a well-presented proposal as if it was delicate parchment paper. Turn the page and smooth it out. Handle it gently and as if it is worth something.
- Position yourself along side of the client and do not block their view or be directly in front or too close.

Encourage customers to touch, taste, smell, look and listen whenever possible. The idea is to utilise the five senses, whenever possible, to accentuate a product or service. Remember the saying. “Tell me - I will forget, show me - I will remember, involve me and it will become part of me.”

A test drive in a new automobile is a very powerful part of influencing the buy. For example:

The customer;

- smells the newness of the interior of the car.
- hears the quietness of the car and the beautiful clear sound of the stereo.
- feels how well the car handles and how comfortable the seats are and how easily it shifts.
- sees all the electronic data on the well-lit dashboard and sees the shiny newness of the car and the beautiful colours.

Four of the five senses are put to work here.

Note: There are many alternative methods and ways to trigger a desire, want or need to buy within the potential client. Explore and use all these avenues plus the many more that are available.

Make a list of various ways you can “Accentuate” products, services, proposals etc. within your business and discuss it with your associates.

Information Analysis Check List

Once you have gathered the information you need to analyse it and decide how to use it.

One of the ways to analyse and use the information is to set up a number of columns on a sheet of paper and systematically go through the information you have gathered.

The **Information Analysis Checklist** example of selling bank service, will give you an idea of what goes under each column. (Figure 1).

Sample: Information Analysis Checklist				
Information Analysis Checklist				
Date:	28 January 2000	Client/prospect:	ABC June Co	
Relevant Information Gathered	How we can help?	Benefit to the client	Now	Need More Info
Over 200 employees on the pay roll – preparation time consuming	Automatic payroll service	Save time & money – complete breakdown, tax break out etc		X
Equipment is old	New equipment leasing package	More efficient monthly tax write off		X
Both MD and executives travel extensively. Receipts and records are a problem	Corporate credit cards with detailed breakdowns	Better control maximises tax benefits	X	
Transfer staff to area regularly	Help with mortgages for staff	Eliminate hassle for staff with pre-approved bonds		X

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Sample Worksheet

Matching the Top 6 Client Objectives/Needs

Date: Client/Prospect:

	CLIENTS NEEDS / OBJECTIVES / PROBLEMS	OUR SERVICES/PRODUCTS THAT MATCH
1		
2		
3		
4		
5		
6		

Module 7
Boosting Sales & Profits With Focus Selling®
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11

Second Person Selling

During the Warming Up The Call process and Breaking The Ice and doing a needs analysis you would have determined who you will be making your presentation to. A few years ago it was most common in the corporate buyer world and personal buyer world to be dealing with one decision maker. Today in the world of selling you have to more often than not deal with more than one decision maker.

Lets look at how you can increase sales with what I call Second Person Selling. The Second Person Selling situation comes into play when you are dealing with an individual who says that he has to take the information to another person or group of people for their approval. It is important for you to know who the decision maker (s) are. Although it is possible that you could be in a situation where the person you are interacting with just didn't know exactly what you were selling, the amount of the money involved, or how it would impact other departments and literally during the presentation or after the presentation lets you know others have to be in on the decision.

Lets say somehow you have discovered that your contact says she has to take the presentation to others for a decision. Here are my suggested steps:

Step 1: May I Present?

Request that you join that person to present the product, service, concept, etc. If it means delaying the meeting to accommodate you as the presenter, weigh up the benefits. If this contact does not fully understand the presentation and the value of what your presentation is and is not sold on it as you are, the odds are you may not get the business. If the client is not in a hurry, and the competition is not involved, my recommendation is to delay the meeting a week or two so you can present.

Another scenario similar to this might be that the main influencer in reference to decision making is away and will not be back for a few weeks. Again I would delay, if I can get in to present to the group with him present.

Now if you are told they do not normally let someone into their meeting or they do not allow group presentations, explain very clearly the details of how valuable it would be if you were there. If your contact is keen on the presentation and proposal, and would like to see it fly with the group, show him/her the benefits of first selling the group on a group presentation by you, and how this could make difference. Give suggestions on how to present the concept to the group.

In other words do everything in your power to be the presenter.

Don't be too pushy because you do want this person to be on your side.

Let's say this has failed and your contact says he will make the presentation. Try step 2.

(Why am I suggesting a delay until the decision maker is there? The reason is that the Sales Cycle becomes a short one when you get to the main decision makers early in the sales process. The YES comes quicker and so does the NO. both save you time, energy and the use of your abilities.

Step 2: Pre Present

Identify once more with your contact who is going into the meeting and explore the possibilities of one or two one-on-one presentations to a couple more people from the group, so they are familiar before the meeting. If you get an agreement it means that you get the opportunity to influence a few people in advance.

This increases your odds of success. If appropriate it may be better to delay the group presentation if you can reach a number of them through personal presentations beforehand.

Step 3: Let Me Help You Present

Suggest to your contact that you would like to ensure that she has all his bases covered so he does not get caught without the answers, or due to inexperience with the concept leaves out a few vital things. With permission from your contact do the following:

- Brainstorm all the questions she may get. Prepare the appropriate answers.
- Identify who may stand in the way and why. Have a strategy to handle these people.
- Identify who may be supportive. Look for ways to help.
- Look at each person's personal agenda and see how the presentation can align.
- Show the format of presentation that succeeds for you and why.
- Provide overheads and visual presentation tools and if possible have your contact talk about how she will present.
- Share and teach her how to do it.
- Get her input.

Step 4: Sells Itself

One of the best ways to increase your success ratio with Second Person Selling is by designing a presentation or parts of the presentation that will sell itself.

This could include one of the following or a combination of them:

- A reduced presentation on a computer disc that would cover your main points.
- A video presentation that is professionally produced.
- A set of overhead transparencies or slides.
- A pre-produced flip chart or flip card presentation.
- An audio tape as part of, or all of the presentation.
- A well bound, easy to follow written presentation.

The "Sells Itself" presentation still requires someone to be responsible for the distributing of the material and/or showing of the video and/or utilising of the disc, transparencies, slides, flip charts, flip cards or audio tapes.

If these materials are to be created to be used without you there, they require more thought when producing them. They should be;

- Easy to follow
- Clearly outline benefits and advantages
- Cover standard questions or objections
- Say who you are
- Be easy for the facilitator to use

One possible addition to this is something I have used, and that is that I have agreed to be on "stand by" at a telephone during the time the meeting is being held. At the end of the presentation I become part of a question and answer session over the "speaker phone" in the boardroom.

By the way, I have closed many contracts through a group presentation over a speaker phone thousands of miles away from the actual location where the meeting is being held. At times I have combined the phone and the fax machine. You could combine the phone and e-mail or your web site.



Exercise 2:

Make a list of ideas that would enhance the four steps of Second Person Selling you could use to enhance your chances of Success.

The Steps	Ideas
1. May I Present	
2. Pre Present to Influencers	
3. Let Me Help You Present	
4. Sell Itself	



GROUP PRESENTATION CHECK LIST

1. Preparation

<input checked="" type="checkbox"/>	Activity	
<input type="checkbox"/>	Location Chosen	<input type="checkbox"/> Outside venue
<input type="checkbox"/>	Their venue	<input type="checkbox"/> Our in-house venue
<input type="checkbox"/>	Confirmed who is attending	
<input type="checkbox"/>	Background information on these people	
<input type="checkbox"/>	Listed objections/questions & solutions/ answers	
<input type="checkbox"/>	Who may oppose and why?	
<input type="checkbox"/>	Strategy to handle "opposition"	
<input type="checkbox"/>	Who may support and why?	
<input type="checkbox"/>	Strategy to enhance "support"	
<input type="checkbox"/>	Dress code of people	
<input type="checkbox"/>	Organized my clothes for rapport	
<input type="checkbox"/>	Visual Prepared	<input type="checkbox"/> Legible
<input type="checkbox"/>	Upper case/ lower case	<input type="checkbox"/> Few points per slide
<input type="checkbox"/>	Prepared handout	
<input type="checkbox"/>	Presented handout	
<input type="checkbox"/>	Requested name tags/name tent cards	
<input type="checkbox"/>	Paper and pens	
<input type="checkbox"/>	Equipment Organized/Ordered	<input type="checkbox"/> Overhead projector
<input type="checkbox"/>	Slide projector	<input type="checkbox"/> Screen
<input type="checkbox"/>	Spare bulb or projector	<input type="checkbox"/> Good flip chart or white board pens
<input type="checkbox"/>	Flip chart	<input type="checkbox"/> White board/black board
<input type="checkbox"/>	Stand	<input type="checkbox"/> Laptop computer
<input type="checkbox"/>	Back-up overhead transparencies for slide and power point presentations	
<input type="checkbox"/>	Microphone	<input type="checkbox"/> Hand-held short cord
<input type="checkbox"/>	Hand-held mobile	<input type="checkbox"/> Hand-held long cord
<input type="checkbox"/>	Lavaliere - Cord	<input type="checkbox"/> Lavaliere - mobile
<input type="checkbox"/>	Video recorder	
<input type="checkbox"/>	Television	
<input type="checkbox"/>	Audio tape player	
<input type="checkbox"/>	Room Layout Option	
<input type="checkbox"/>	Mailed	<input type="checkbox"/> Delivered
<input type="checkbox"/>	Faxed	<input type="checkbox"/> E-mailed
<input type="checkbox"/>	Confirmed By	<input type="checkbox"/> Fax <input type="checkbox"/> Phone
<input type="checkbox"/>	Start time	<input type="checkbox"/> Stop time
<input type="checkbox"/>	Date	<input type="checkbox"/> Day
<input type="checkbox"/>	Location	<input type="checkbox"/> Equipment request
<input type="checkbox"/>	Room layout	<input type="checkbox"/>
<input type="checkbox"/>	Directions how to get there	
<input type="checkbox"/>	Review checklist - all items packed	
<input type="checkbox"/>	Carrying attractive carrying case	

<input type="checkbox"/>	Arrive early	<input type="checkbox"/>	Follow Others:	<input type="checkbox"/>	Our in-house venue
<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	Quick break for set-up
<input type="checkbox"/>	Positioned flip chart/white board				
<input type="checkbox"/>	Positioned overhead/screen/tables				
<input type="checkbox"/>	Ample table space				
<input type="checkbox"/>	Equipment tested and adjusted				
<input type="checkbox"/>	Started on time				
<input type="checkbox"/>	Stopped on time				
<input type="checkbox"/>	Question and answer				
<input type="checkbox"/>	Price not discussed with the group				
<input type="checkbox"/>	I was myself				
<input type="checkbox"/>	Talked to group as if "one person"				
<input type="checkbox"/>	Used individual names				
<input type="checkbox"/>	Referred to company and industry				
<input type="checkbox"/>	Talked to everyone				
<input type="checkbox"/>	Utilized knowledge of styles				
<input type="checkbox"/>	Consciously Presented To				
<input type="checkbox"/>	Tonal people	<input type="checkbox"/>	Visual people		
<input type="checkbox"/>	Feeling people	<input type="checkbox"/>	Digital people		
<input type="checkbox"/>	Allowed a quick break				
<input type="checkbox"/>	Used Contrast	<input type="checkbox"/>	Video		
<input type="checkbox"/>	Slides/overheads	<input type="checkbox"/>	Power point		
<input type="checkbox"/>	Flip chart	<input type="checkbox"/>	Another presenter		
<input type="checkbox"/>	Feedback	<input type="checkbox"/>	Demonstrations		
<input type="checkbox"/>	Positive focused feedback				
<input type="checkbox"/>	Feedback/enquiry form utilized				

3. After The Presentation

<input checked="" type="checkbox"/>	Activity
<input type="checkbox"/>	Presentation personally criticized
<input type="checkbox"/>	Thank-you calls and notes
<input type="checkbox"/>	Requests followed up
<input type="checkbox"/>	Feedback On Presentation
<input type="checkbox"/>	By phone <input type="checkbox"/> By fax
<input type="checkbox"/>	In person

Presenting To Two Or More People

More and more salespeople are being asked to present their products, services, solutions, ideas and concepts to groups from 2 to 20 people.

The ability to present with impact in front of a group is as important a skill as being a professional salesperson. Following is a guide for when you are doing group presentations.

Group Presentation Guide

Preparation

- **Location Decision**

Lets look at the strengths and weaknesses of location choices for your group presentation:

Outside Venue

Strengths	Weaknesses
<ul style="list-style-type: none"> - Neutral group for everyone - Usually has a conference/ meeting/special occasion feeling - Well catered - Equipment readily available - Parking - A feeling of being special for the client especially if it is done right 	<ul style="list-style-type: none"> - Client may have to travel - Some elements of venue such as catering, air condition, heat and equipment could be less than satisfactory - Meetings nearby could interfere with reference to sound

With outside venues you have options as to how elaborate, unique or business like you want the meeting to be. This would depend on budget, location selected and the limitations of your creative thinking. You could have a meeting in the boardroom of your client's venue

Clients Venue

By working closely with your contact there is an opportunity to demonstrate your ability to deliver results by carefully adding a few unique ingredients to the pre-planning and delivery of the meeting. If the meeting brings a freshness to their locations, it could make a positive impact.

Our (Your) Own In-house Venue:

Strengths	Weaknesses
<ul style="list-style-type: none"> You have control over set-up, equipment and catering Chance to have them experience your premises and people You'll be on time Can handle unexpected situations You can display your hospitality 	<ul style="list-style-type: none"> Client could feel uncomfortable Client and other participants could be late or get lost Premises may not project professional image Could get handled incorrectly by other staff Takes more of the client's time

With your own venue you have options as to how elaborate, or business like you want the meeting to be. You have extra time to change the environment with posters, themes decorations and even a formal tour from the time they arrive.

You could also utilise the local chambers of commerce or business clubs after having lunch there. Your presentation could have a theme of navigating for profits and the meeting could be on a large sail boat. The only caution I have with unique venues is to not let the venue or theme overpower the presentation or reason for being there.

As you can see there are benefits and advantages to all three. There is no one right answer. Your theme, your group timing and a number of other factors will help you make that decision. Most important of all is the opinion and need of the client.

- Do your absolute best to find out exactly who is going to be there.
- Take the time to gain background information on all participants.
- Brainstorm all objections and questions that have come up in the past, could come up in the future or questions that are **now** on the table. Then decide how to handle them. Also look at the possible unexpected situations that could occur and how you would handle them.
- There may be people in the meeting who may have a stance of opposing what you are doing, or who will, or is, standing in the way of closing the sale. Try and identify who these people are and the probable issues.
- Put a strategy and tactics together to address these people and their issues.
- Identify who is already on your side or supports your type of thinking. Know why they are "on side."
- Decide on the things you can do to enhance their support strategy. For example, to talk about something the person has said or done.
- How will the people at the meeting be dressed? Be careful when you are talking to a secretary or personal assistant who may assume it is business attire or casual but does not know for sure.
- As we discussed in the Building Client Rapport Module, is important to be like them. Adjust your dress to theirs. Rule of thumb is it is easier to remove a neck tie, jacket, etc. than it is to find one. If you are unsure, dress up not down.

- 90% of the visuals used in corporate presentations at conferences and meetings are not very effective. You or a secretary sitting at a computer, creating graphics and writing everything in that you want to say on an overhead transparency or slide, looks great when you are a half a meter or foot and a half away. In a meeting with more than four or five people it may lose its power.

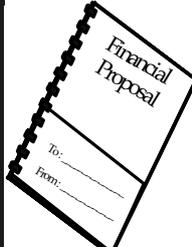
For example the next page is a page from our written proposal on this module. The following page is an overhead of that page. See how the page designed for a written presentation has too much on it for a visual presentation to a group or on a flip chart or flip book. On an overhead or slide do not put in full sentences for people to read. Use only trigger points for you to expand on verbally.

Module 7 Presenting The Solution



Clients have a tendency to skip past all the hard earned effort of the written presentation and look for the bottom line cost on the last few pages.
The solution to this problem- put the price under separate cover!




The participants will learn the why's and how's of successful presentation selling that will include:

- Selling to more than one person
- What today's buyer is like
- Information influence factors
- The written presentation
- Utilizing audio / Visuals
- ... systematic and strong
- ... developing and pre-
- ... portion will include:
- ... the right language
- Tying in the benefits
- Utilizing options
- Making it financially digestible with small understandable amounts
- Asking for the business in writing

OK For Written Presentation
Not OK for Visuals

**Module 8
Proposal Selling**

- Selling To More Than One Person
- What Today's Buyers Is Looking For
- Information Influence Factors
- Utilize Audios / Visuals

Written Presentation

The Financial Proposal

OK For Visuals
Not Enough for
Written Presentation

The simple rule for visuals is to:

1. Make it legible and to be read more like a billboard on a highway where cars are passing by at a certain speed.
2. At a glance or from a distance it is hard to read several words if they are all capitals (Uppercase). Lowercase letters have shape which gives the word shape. The subconscious picks up on shapes very quickly. Make most of your words in lowercase letters.

E.g. **UPPER CASE**

THE PARTICIPANTS LEARN THE HOW'S AND WHY'S OF EFFECTIVE PRESENTATION.

E.g. **Lower Case**

The participants learn the "how's" and "why's" of effective presentation

3. Try and keep your visuals down to four to ten points with only a couple of words in each point. Also use colour and pictures/graphics to enhance the presentation.
 - If you are giving a sales presentation with visuals, be sure to have a more comprehensive copy of what you have presented. You want something that will reinforce the points you have made and a written handout-presentation that is clear on benefits and advantages. Remember the written presentations could go to someone who has not seen you present.

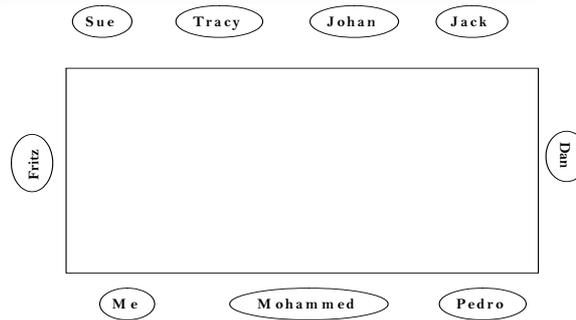
Buying Motives		
Most Often With Individuals	Most Often With Companies	
<ul style="list-style-type: none"> ■ Comfort ■ Convenience ■ Enjoyment ■ Luxury ■ Good Health ■ Affection ■ Sexual Attraction ■ Good Food and Drink ■ Beauty ■ Good Housing ■ Personal Protection ■ Relief ■ Personal Security ■ Less Work ■ Safety ■ No Worry ■ Become More Attractive ■ Desire To Possess ■ Advance In Skill 	<ul style="list-style-type: none"> ■ Self-Improvement ■ Style ■ Prestige ■ Recognition ■ Acceptance Of Others ■ Affection ■ Learning ■ Admiration ■ Imitation ■ Feeling Together ■ Being An Individual ■ Feeling In Control 	<ul style="list-style-type: none"> ■ Cut Costs ■ Save Money ■ Increase Profits ■ Increase Sales ■ Increase Productivity ■ More For Your Money ■ Long Term Results ■ Return On Investment ■ Long Wear ■ Guarantee ■ Prevent Loss ■ Protection Of Assets ■ Lower Your Liability ■ Tax Break ■ Sure Time ■ Gain Market Share ■ Quality ■ Accuracy ■ Control

Too Many Points

**Module 14
Winning With Super Service**

- Support Team On Side
- Super Service Plan
- Blowing The Customers Mind
- The "How Can I Help" Plan

- Print more than enough handouts well in advance.
- Even in small meetings of 8 to 12 people at a boardroom table I request name cards on the table to help me call people by name. The problem is they all usually know each other, but you don't. It is easier to do this if there are several people you are meeting for the first time. I thank them and tell them how it helps me. Then I often nicely suggest they may try it in meetings. I may joke about my aging memory as well.
- Another method I use in small groups is to draw a birds eye picture of the room and then fill in the names of the people at various points at the table. A few quick glances and I have got the names.



Always carry name cards and name tags with you just in case the meeting co-ordinator could not look after the request. With typed names make sure the letters are real big so they can be read at a distance.



- Carry enough paper and pens with you just in case they are not provided.
- An overhead projector gives you flexibility. You can toss out a few overhead transparencies very easily. You can shorten the presentation or lengthen it in a flash. I carry extra transparencies that explain add on concepts in case the opportunity comes up. Overheads are made for operating with the lights on or in daylight so you do not end up standing in the dark talking. Remember, the visuals are only visual aids; they are not the presentation.
- I have watched many sales presentations where you could not see the presenter's face or even see his body. Only 7% of the effectiveness is being used. Also with overhead projectors all you need to do is plug them in and adjust them and you can find one almost anywhere. Local school, library, etc. Bring your own if necessary.
- The slide projector gives a cleaner picture but often the lights need to be dimmed. It is very professional looking, but you are in trouble if you have slides in the wrong order or in backwards. Also if you want to refer to one specific slide several times it is tough to go back. Pre-planning could mean you put the same slide in several times. Spontaneity is limited with the slide projector. In the past, slide projectors often needed a second person to operate. They created co-ordination problems. Remote control solves that.
- The use of Power Point slides and a Data Projector (Lite-Pro, Proxima) works in a similar manner to the slide projector but it has more flexibility. Again it is more structured than overhead transparencies. In the high tech world the use of information technology builds rapport. With the right Laptop you can write on the screen (Tablet PC). It also works in daylight and you do not have to work in the dark.
- A friend of mine, Noel Studti uses Power Point and slide projectors but he always has overhead transparencies as well especially with large audiences and vital presentations. The computer and slide projector are not as reliable. Be prepared.
- Request and see that a spare bulb is available or in the projector. Remember it has to blow out sometime. Hotel staff will often say, "they very seldom blow, but if it does we have a spare bulb in the office." That is no help to you in the middle of a presentation. Also, the client does not blame the hotel he blames you. You chose the hotel and did not take control. Rather than a spare bulb, it may be a spare projector.
- Be sure to have a full flip chart pad or a solid stand if you use a flip chart or a white board that sits solidly on a stand.
- If you are speaking to 30 or more people consider the use of a microphone. If you are afraid of a microphone arrive early, get the levels set and practice with it. A microphone amplifies you and your presentation.
- A hand held microphone with a cord is the most reliable. I recommend a long cord so you can walk around and feel natural.
- There is a bigger chance of battery problems or reception problems with a hand held mobile microphone or lavalier cordless microphone but they look more professional and there is less chance stumbling over the cord.
- A video player and television should be ordered or arranged if you need it. Again, check in advance or go early to make sure everything is working.
- Also arrange for audio tape players with speakers if necessary or if you need to transcribe later.

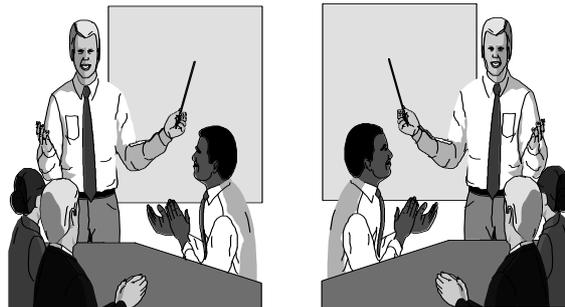
- **Physical Layout of the Room**

There are several options for setting up the meeting room. Be sure it is one you are comfortable with providing you have control over it. Be sure that you let the host/hostess or hotel know how you need the room set up if it is appropriate. (At the client's premises it may not be possible.) Remember you are doing the presenting and they are the customers. Either mail, deliver, fax or E-Mail to ensure they have received the information. This would go with your equipment needs.

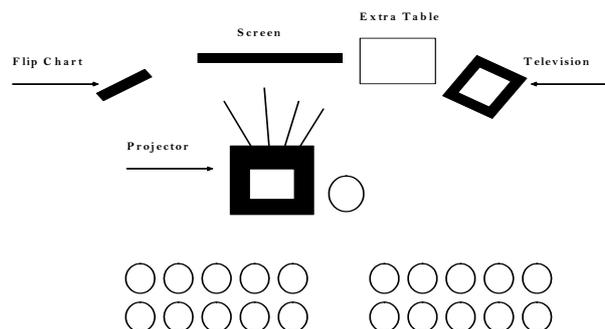
- Confirm the date, day, location, start time and stop time as well as details as to what they can do for you regarding equipment and room layout.
- Get clear directions and/or ask them to fax you a map if you need it. Do the same for people you invite.
- Review and check that all items, handouts, etc. are packed.
- Carry an attractive carrying case. This sets stage for professionalism.

Presentation

- Always arrive early and ask to get into the meeting room so that you can set up the equipment and your materials the way you feel comfortable. I always try to be 30 to 45 minutes early and often 1 hour early.
- When being invited to make a sales presentation you may find that you enter the meeting when it is being run. For example the meeting may be from 9am to 11am. From 9:30am to 10am is another presenter and when that person is finished you are on. One of the following is necessary to make sure you are set up properly.
 1. Arrive before the meeting starts at 9am and get your material in place so you can walk in and start at 10am.
 2. Request in advance for a quick five minute break for you to set-up. This is better than having no time, but I would suggest you still come early to check your equipment, etc.
- My suggestion is to have your Flip Chart / Whiteboard positioned to the front left of the audience if you are right handed and front right if you are left handed. This way your body does not block the flip chart when writing.



- Position your table with the overhead, laptop or slide projector slightly to the left, off-centre along with the screen. This way you are in the centre and your visual aids are slightly off centre. Consider an extra table for slides, transparencies, samples, etc. That way you are personally positioned in the centre



- One of the mistakes made by presenters is they try to do the job with little table space. Spread your material out so you can see it.
- With microphones get the level set and then turn the microphone off and watch it closely so hotel staff do not play with the volume. They have a habit of walking in and turning the knobs without really knowing what it does to sound levels. Be sure your overhead projector, etc. is focused in advance. It is unprofessional to do that after you start the presentation.
- Start on time unless a key person is a few minutes late or the client requests a delay.
- End on time. They may have appointments.
- Offer to stay longer if some people wish to ask more questions, details, etc.

- Written presentations and audio/video/visual presentations to groups should not include the price, unless the senior executive wants you to talk price. Often the presentation is to get a buy in on the concept and price negotiations are then handled by a department head, etc.
- Be yourself. You may have a favourite speaker or mentor who has a style of speaking and you would like to be just like him. Forget it. You will never be him, but you can take some of the principles and apply it to your style and personality. Being sincere and yourself is very important.
- Talk to the entire group in the same way you would speak to one person. You will be surprised at how effective you are. Drop all roles, talk to people and be yourself.
- Utilise people's names; this keeps their attention. People love the sound of their own name. Don't overdo it though.
- Be sure you have personalised the presentation by referring to their company and industry.
- Be careful that you do not end up talking mainly to three or four people, because they stand out. Seek out and look at people who seem to disappear into the woodwork.
- Use the knowledge of personality styles picked up in Module 4 – Building Client Rapport. You will probably have a room with parts of all styles present.
- When speaking, be aware that you are also talking to people that are tonal, visual, feeling and digital (facts & figures) oriented.
- If it is a long presentation, suggest a quick break.
- The key to keeping people's attention is to use contrast with voice tones, expressions, words and body language. Also, adding another presenter, asking for feedback, doing demonstrations, getting a show of hands, adding visuals, cartoons, etc. makes a presentation more dynamic and alive.
- At the end, or end of a section, ask the individuals how they see it working for them, what did they like the most or what would work for them. This way you are moving towards positive feedback.
- On a presentation that is providing information to a fairly large group, utilise a feedback form where people tick a box for information or a follow-up call.

After The Presentation:

- Take the time with those associates who were with you to critique how you did as an individual and as a team. What was great, good and needs to be improved. Plan to use this information.
- Send out thank-you notes and make thank-you calls.
- Be sure that requests are immediately handled.
- Ask your key contact by phone, fax or in person for some feedback on how things went and where we could improve.

The Written Sales Proposal

In my opinion there is no one way to write a written sales proposal.

Over the years as a salesman, I discovered that many clients have a tendency to skip past all the hard earned effort of the written presentation and look for the bottom line cost on the last few pages.

During my years as a sales representative selling radio advertising I switched to a different process.

I created two distinct parts to the so called written sales proposal. The first document was the Sales Presentation and the second one was the Financial Proposal.

Quite often, after many hours of research and writing I would sit with a client, hand him the presentation and before I would get started he would go to the back page and say, "Where is the price?"

With a smile on my face I would say "In my briefcase." Then I would explain the effort I put in and once we went through the content of the presentation we would then talk price. I would also say that if time was a factor we could reschedule. This very seldom happened because I usually booked ample time for the presentation in the first place.

Even if I am not present or am mailing a sales proposal to a client, I like sending two documents. That way the body of the presentation can be read by many, but the costs read by the few who are in control of the budgets. In reference to this section on the written sales proposal or sales presentation I am going to give you a few options in writing sales proposals.

I will share with you an example of how to write the sales presentation and financial proposal. We will look at what I normally put in these sales proposals and why.

The first sample is a format I used in broadcast sales. The names and some of the content have been taken out so that it does not identify the client and his client.

You will also receive a guideline or written proposal which includes proposal format styles and tips on writing the sales proposal.

In addition you will receive a brief description of a simple but powerful format used by Noel Studti the Managing Director of Stratham Bryce in Johannesburg, South Africa, whose experience in selling and sales management comes from several years in sales and management with IBM and Siemens Nixdorf. Noel's closing ratio in selling is unsurpassed. I thank Noel, who conducts four day sales institutes and markets a sales management software program second to none.

As I said at the start, I do not think there is any one correct way, but you will see there are a number of similar principles running through the different suggestions and examples.



Proposals burn up a lot of time, energy and ability especially if you start from scratch each time. Develop a format and parts of the proposal that can easily be adapted to clients, but do not do it at the expense of losing sales and presentation power.

Also be careful of **proposal -itis**. This means you become proposal crazy. You invest time doing extensive proposals to unqualified clients or when you do not need the proposal to get the business.

Remember the objective is to get the absolute best return on personal assets invested.

Writing A Business Proposal

Types Of Proposals

When writing a proposal consider that there are two main types:

Independent Proposal

This is the one that is often submitted without any personal contact. It could be mailed, delivered or be part of a presentation someone makes on your behalf. Here are three things to consider:

- It will be compared to the competition. Does it look and feel good?
- What is on the pages is the ultimate test. Have a few qualified people go through the content.
- Does it give the whole story. It must, because there is no one there to give the whole story.

Where some salespeople go wrong is that they say the proposal should only be a few pages. They may be correct if they are there presenting, but they will usually lose if the proposal has to do the selling.

Sales Support Proposal

This type of proposal is there to back-up the visual or verbal presentation. This is usually a situation where the visual or verbal presentation is in actuality 90% of the presentation and is what closes the business. The Sales Support Proposal could be a copy of the slides. The caution here is if the Sales Support Proposal is taken away from the meeting and becomes part of the decision making process with people who were not present. Make sure the key elements are clearly explained.

Formats and Content

I recommend you establish your own format just as you do when verbally presenting or Building Rapport with someone. Some suggestions;

Cover Page

- Title of proposal
- Presented To: Name/Title/Company
- Presented By: Name/Title/Company
- Date
- Your Company Address, Phone Number, etc.

Table of Contents

Consider using "icons" (symbols) with the content description.

Attention Grabbing Introduction

- Criteria presentation is based on.
- Who you are and why you are making the proposal.
- What the client can expect from the presentation.
- Brief summary of what is in the presentation.

Client Situation/Market Situation

Facts, figures, opinions of what the client's situation is right now, what the industry is faced with and details about their customer's needs.

Proof

Research or information that supports the above.

What's Needed?

This is what is needed to solve the situation or for the client to benefit.

Who Would Feel The Results?

This is where you take the time to show who would be effected by the action suggested. It could be the industry, the community, the customers, the client and even your company. It could be one or all of these.

Goal

A clear description of what you plan to achieve for the client and how the client will benefit.

Strategy And Tactics

A simple, easy to follow format of strategies and tactics that will bring your goals for the client into reality.

A Flow Chart

A flow chart or a schedule or time table when the various things should happen. (This moves people towards action.)



Financial Proposal

I suggest this be done under separate cover, but it is not necessary to follow my recommendations. This includes;

- Cost breakdown
- Financing options
- Comparisons
- Breakdowns to smallest denomination.

Key Personnel

Names, titles, background on those people in your company that will make things happen.

Corporate and Personal Commitment

A brief but meaningful commitment page that the client could hold you to. Think carefully about this one.

A Summary

This is where you restate several of the actions and benefits on one or two pages. It is important that this is fresh in their minds.

Call to Action

One simple page with even one "big" sentence that asks for the business and suggests we get started, is a good way to end the presentation. Make it sincere and request oriented. Write it as if you are on a one to one basis.

Support Documents (As an appendix)

Reference letters, computer print-outs, corporate and personal brochures, client lists, research findings, award credits, charts, etc.

Helpful Guideline

Following are some additional pointers and suggestions that will make your presentation more effective.

Proper Spelling

It is absolutely vital that you spell the names of people, their company and their town or city properly. Check the business card, brochure or phone their office if in doubt.

Contrast and Style

- Use lots of white space like in print adversary.
- Use some sentences and paragraphs (text).
- Highlight certain statements.
- Use graphics, graphs, models and symbols.
- Use lots of bullet points.
- Start each section on a new page.
- Have a structured look.
- Use consistency, e.g.
 - = Communicate
 - = Listen
 - = Give feedback
 - * = Acknowledgements

Suggestion: Read the "how to's" of writing articles and newsletters in our Making Personal and Corporate Marketing and Advertising Really Pay. Many of these writing principles apply to the sales proposal. Make your proposal stand out with professionalism.

Deadlines

- Know what the deadline is for submitting your proposal.
- Set a deadline for your own completion. List the actions you need to take:
 - Research your need.
 - Who you need to interview to get the proper information?
 - Decide on format.
 - Budget.
 - Independent or Sales Support Proposal.
 - List of everything you want in the proposal.
 - Set a time table and project completion date.
 - Who will help?
 - Formalities that need to be followed, e.g. Government

Benefits:

Continually monitor yourself by saying "What is in this for the client?" Yes, mention features but as often as possible show the real benefits and advantages to the clients.

Question and Answer:

The Federal Government in Canada assisted small businesses to the tune of several million dollars to attend the Business Owner Development Programs conducted by one of my companies in Canada several years ago. The proposal that got the approval often stood alone. At the end of the proposal I had eight to ten pages of questions and answers.

I brainstormed all the main objections, fears and concerns that the decision makers may have. (Who? What? Where? When? Why? How?) I then put them in as questions and gave the answers. It worked phenomenally well.

The questions and answers approach works well on complex topics or highly technical situations. It can also open an individual's mind to other points of view and alternatives.

You could actually put these questions and answers in a separate bound document. Be sure your answers are correct. It is in writing!

Educate and Inform

I think this belongs at the top of the list if it is done in a professional way and not in a patronising, condescending way. Remember **"Educate the customer and you will never have to knock the competition. They will knock themselves."**

Utilise The AIDA of Advertising

Within my proposals I try and use these four principles as a guide.

ATTENTION: Get the client's attention! I try and do this in two ways.

1. The cover page with a strong statement about what the proposal is e.g.
2. Get the clients attention by educating the client on the topic that will establish a theme throughout the presentation that ties into his/her need. It is setting up the balance of the presentation with Credible Criteria upfront. Your presentation then proves that you can deliver to the customer. Following are some examples.

Module 8

“A Winning Advertising Strategy
For XYZ Tire* Co.”

“The Management Development Series”
As The
“Ultimate Corporate Citizenship Program”

The Complete Sales Action System ®

Two “Cover Statements”

Module 8

According to Mike Crankshaw, Fleet Management consultant to major automobile manufacturers, there are six main functions that have to be properly understood in order to profitably operate a successful Fleet Management Program. They are:

1. Vehicle Selection Techniques
2. Purchasing Methods
3. Financing Choices
4. Maintenance Management and Low Cost Operations Procedures
5. Correct Replacement Timing
6. The Best Ways to Re-Sell The Vehicle

The Complete Sales Action System ®

A Sales Presentation for Fleet Business

Module 8

Bill Gates recently said in an interview with Fortune Magazine, “There are six areas of expertise needed to install a proper networking system throughout a major corporation.” This presentation is based on these six areas. They are:

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.

The Complete Sales Action System ®

A Sales Presentation – I.T. Industry

Module 8

International Real Estate Tycoon Peter Thomas says that if a real estate investment has his six principles of effective real estate investment covered he always goes ahead with the transactions. This presentation is based on these six principles of effective real estate investment. These principles are:

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.

The Complete Sales Action System ®

A Presentation for Real Estate Investment

I know that I could sit down with a sales team in any industry and develop such a format for a presentation. You can too. Just try it and see how interesting your proposal becomes.

We have now looked at **Attention**. Let's look at **interest**.

Interest

Once you have the attention you then want to keep the interest. In the advertising sales proposal I expand on the education process of what the five keys to profitable advertising are. The same thing happens with the Management Development Series Sales Proposal.

Desire

By now bringing the client's situation into the presentation under the principles of profitable advertising the desire begins to build within the client. (Example follows)

Action

In the financial proposal and at the end of the presentation there is a call to action as to what? how? why? etc.

The Confirmation Sales Proposal

I must admit that over the past several years, and even in my latter years as a broadcast sales representative, I switched to a different way of doing written presentations and financial proposals.

For example as a sales marketing and management training and development consultant/speaker, I very seldom write extensive proposals.

When a potential client says, “Give me a proposal.” I will often say that it is a very difficult thing to do if I do not have enough information.

I will tell him/her what my half day rate is and then I will suggest that I come and invest four to six hours in a meeting with the key people to look at the real issues they are faced with, and during that period will be part of solution finding and facilitating a direction.

I will also suggest that during that time, they will get to know me better and will know whether or not they would like to do business with me and if it makes sense from both sides. I will also guarantee them they will get real value during that period and if they do not engage my services that I am okay with that.



Now what happens during that period is that time and genuine assistance creates a **relationship** of one degree or another and in turn that equals a **commitment** from both parties.

An additional thing I mention is that I know their time is valuable and I do not want to waste their time with a presentation that misses the mark. I also suggest we will probably know whether or not we will do business by the end of the six hours.

My usual results are that at the end of the six hours, we decide there is no need to give them a proposal. Instead I construct a confirmation letter in conjunction with the client as to exactly what we have decided to do and what the investment will be.

This takes it beyond consultative selling to partnership selling. The written presentation and financial proposal is just a confirmation on the agreement. They tell me to eliminate background on my company, on me, etc. and in essence it becomes the basis of a flow chart of what will be accomplished.

This is unorthodox and I am not saying this is the way you should go, but it sure saves me a lot of time in sales proposal writing and it darn near guarantees I will get the business.

One time Neil Godin and I met with a seminar executive by the name of Paul Atkinson with Shell Canada in Vancouver, Canada.

We were one of four groups bidding on a Western Canada Retail Gasoline Training Tour across Western Canada.

Paul had heard about the results one of his dealers achieved after seeing Neil and I speak at a public seminar session, sponsored by the Kelowna Chamber of Commerce. He called me and said he would like to meet Neil and I. He said that we were late comers because most of the proposals were in. Within days we were in Paul's office.

On Paul's desk were three other proposals. One of those proposals must have cost four thousand Canadian dollars to put together.

In the meeting we quickly developed rapport. We could see he liked what we had to say. We also discovered that the biggest hurdle Paul had was not finding the speakers, but it was convincing the retail gasoline and food store management to come to the events.

Neil and I immediately switched into action. We quickly let him know what areas he had as challenges. We checked to see if Paul had time to put an extra hour with us. He asked why and we responded with the answer that we would in the next hour design a strategy with him that would pack each event. With his permission I went to the car, brought in my flip chart and masking tape. We masked the paper to his walls. (Doubled up so as to not mark his walls.) In just over an hour we did the following:

- Designed the basics of a direct marketing brochure to promote the event.
- Designed three other mailers including a client feedback form as to what they wanted to learn at the events.
- Put together the content of what we would suggest and what people could chose from.
- Listed all the things we would do to see these events succeed.

Paul got excited and asked if we could give him a quote. I asked him if he wanted it right now. He answered with a, "yes." I jokingly told him to turn his back while we talked. Neil and I chatted. We gave him a piece of paper with a price of \$41 000. He answered with \$45 000 and said "Do a good job."

The written presentation was on a flip chart. The financial proposal was one sheet of paper. What happened?

We kept Paul's interest by showing him things he did not know. He was being educated as we moved through the process.

The most important factor was that Paul was confident he would get real results from us. Isn't that what the sales proposal is all about?



The Noel Studti Proposal Strategy

The first step in delivering an effective proposal is a separate covering letter thanking the client for allowing you the privilege of delivering a proposal. We then continue the exercise totally interactively, debating with the students what they think a proposal is, how brief, how long, how professional, etc. Then we lead them to acknowledging that we need various sections of detailed information in the proposal, all of which must be summarised at the end into no more than three pages. Ideally it should be one and a half pages. The key learning point is that the only part of the proposal that the Decision Maker is likely to read is the summary. We can only do this management summary once we have done all the other work, because basically what we are doing is summarising all the detailed sections of the proposal into the salient points in one and a half to two pages, but not more than three. We must continuously ask ourselves during this management summary: "What is in it for the customer?" We are writing that summary to be read by the decision maker and he is going to make his decision based on the information in the proposal, and if that's all he is going to read, then we must be sure that we are including the key points. There must be no surprises in the proposal. If we are following the logical selling process and have gained concurrence by the time we have produced the proposal, there will indeed be no surprises. Nobody can make a decision without costs and, unless absolutely irrelevant, a cost justification must be included. The body of the proposal contains all the typical sections: Why should they buy from the company; cost breakdown, cost justification, cost of ownership, technical specifications, etc. Appendices can be used for brochures, company profiles, and so forth. The emphasis must be on quality and the impression that it makes on the customer to receive a well-bound document, ideally on paper that is pre-printed with the customer's logo, and feels like that which sets the standard. If 70% of decision making is emotional, then a well-bound document will add to the emotional reason why a customer will want to do business with you.

THE EFFECTIVE PROPOSAL BY NEIL STUDTI

Letter of Thanks/Covering Letter

Management Summary

- Précis of body - 1 to 2 pages
- Description of Requirements
- Our offer including costs
- Justification
- Why deal with us?

Body of Proposal

- Clarify requirements
- Details of Offering
- Cost Breakdowns
- Detailed Justification

Appendices

- Company Profile
- Boilerplate and Brochures

No Surprises

Stratham Bryce

Tendering

One of Knowledge Brokers International's (KBI) clients is Siemens Industry and Energy in Midrand. According to Rod Gray and Ian Chisholm of Siemens they have integrated a number of the principles of Proposal Selling – Presenting the solution for KBI's Sales Systems.

The fact is that Siemens are continually involved in Tendering for small projects as well as Mega Projects.

We've listed them in point form for you:

- **Written or verbal:** Most of the times your tenders will be written tenders or proposals. On the smaller transactions or with clients who know you well, the tender could be a verbal one that is accepted by the buyer or procurement (purchasing) department of the client company. With the verbal ones it is important to confirm it in writing so there are no discrepancies later on. It is then, basically a Confirmation Proposal.
- **Extra overheads to back-up the PowerPoint:** If you are going to do your presentation on PowerPoint, and it is a major contract or one where you can't afford any glitches, it is wise to back it up with "Overhead Transparencies". Have an Overhead Transparency Projector there to back up the "Lite Pro" presentation. We've all witnessed presentations delayed or completely destroyed with "Lap tops" and "Lite Pro" equipment failing during or before a presentation. Very seldom does it happen with Overhead Projectors. (have a spare bulb)
- **Who's there:** Know who is going to be at the presentation and / or who will be in on the decision. Understand their roles, agendas, goals, and will they probably support you, be neutral or an opposer. At a Siemens presentation they could have a maintenance manager, some engineers, a production manager, a general manager and someone from procurement. The presentation needs to appeal to all of them.
- **Layout:** In a typical Siemens Industry and Energy presentation the layout would run along these lines:
 - **Letterhead:** A covering letter on the Siemens letterhead.
 - **Cover Page:** An attractive Cover Page with details of who is being presented to, who is doing the presentation, date and the project.
 - **A Content Page** to indicate what is being covered in each section.
 - **An Executives Summary:** A summary of the tender (Presentation) so that a busy executive can get the basics very quickly.
 - **Features and Benefits:** They do not give a huge list of Features and Benefits. They take the top 5 in order of importance and if they think it is necessary they put together the next 5. In the end they've included the top 10 Features and Benefits. They do not assume that an Engineer will naturally understand the Features and Benefits even though he or she may be well versed in a specific area. They still clearly "spell out" the Features and Benefits.
 - **Contrast:** To give life and Contrast to what could be a fairly boring or conservative tender presentation they do things like making the information pages colourful and then making the technical parts very technical looking.
 - **Statement from the executives:** They include Statements and commitments from the senior executives to confirm their support.
 - **References and Neutral Articles:** They also include Reference Projects, Reference Letters and Quotes as well as Articles about their equipment, processes and successful case studies written by writers who are neutral in their relationship with Siemens.
- **Highlight What You've Excluded:** They suggest that is vital that you don't just say what you will do, but layout what you won't do or will not be responsible for. Examples: 1) Siemens may say "we will install the pipes but we don't provide the pipes." 2) VAT is excluded in the price.
- **Paper, Pens, Brochures, Business Cards:** Have note pads with your logo on them. Don't assume they have pens. Provide the pens as well and if possible, ones with your logo on them. Give everyone brochures and the business cards of those presenting.
- **Have a Bid / No Bid Process:** Have a check system so you can decide whether or not you really want to bid or tender for the project. (Sample questions will be covered later.)
- **Who do we know:** Who do we know that is part of the decision making or could influence the decision or could navigate us with important information? What is our relationship with these people?
- **Who is entrenched as a supplier:** Find out who is entrenched as a supplier and find out their strengths and weaknesses and how they are presently viewed by that company.
- **Post Tender Phase:** In the post tender phase try and get in early and gather all the necessary information and give preliminary details on your direction and prices. Be prepared to adjust your proposal.
- **Impact:** Don't be afraid to go for impact to get their attention even if you are a conservative type Industrial, Mechanical, Technical type organisation. Ian and Rod described what they did when bidding for a large international project with a South African based Global Company. Following are the quick details:
 - They went to a small company in Benoni and had an attractive Aluminium Box made to put the tender proposal inside of.
 - The lining was a soft car seat type fabric.
 - They included a beautiful Leather-bound "rich looking" Executive Summary.

- The Aluminium Box held files like a little file drawer. The various parts of the presentation were filed and identified in the box.
- They included a CD with reference sites, references and a full story on Siemens Industry and Energy and their capabilities internationally.
- They also included both the overhead transparencies and the PowerPoint presentation to allow people in the buying company to present the material if needed.
- They had the heavyweights at the presentation. It included Koos Smit – Director, Key Account Person, A Specialist, a representative from Germany as well as a few other people.

It was definitely a presentation that had impact.

Bringing Out The Heavyweights – 2010 Soccer Bid

“Yes”, according to Joseph Sepp Blatter, FIFA President, “The FIFA executive had certainly been impressed” by the fact that 3 Nobel Peace Prize Winners, Former President Nelson Mandela, Former President F.W. de Klerk and Archbishop Desmond Tutu were all in one room in support of South Africa’s bid for the 2010 Soccer World Cup.

The actual presentation itself included former President Nelson Mandela, President Thabo Mbeki former footballer Abedi Pele and bid chief executive Danny Jordan taking turns presenting the reasons why South Africa should receive the 2010 Soccer World Cup..

It obviously paid to pull in the heavyweights. After South Africa won the bid, Egypt who was the number 3 country in the running stated that they started far too late in building relationships. It is a good lesson. Start early to build relationships on any bid if it is possible.

Bid / No Bid Decision Criteria – Yes / No / Not Applicable

Following are important questions that Siemens Industry and Energy asks before deciding to go forward or decline the opportunity.

- Have the Sales Team read the document?
- Is the enquiry in accordance with our overall strategy?
- Is the contractual / commercial risk acceptable to us?
- Is legal advice required?
- Is the “scope of works” clearly defined?
- Does the enquiry ask for a lump sum price?
- Is the enquiry re-measurable? (Can it be audited?)
- Will the contract be cash flow positive?
- Is the financing assured for the contract?
- Should a financing model be offered?
- Is it a preferred client?
- Are we normally competitive in this type of business?
- Does the enquiry fit to a project we’ve done before?
- Does the client have a preferred supplier in our industry?
- Are there any technical risks?
- Is there an engineer required?
- Is there sufficient technical process expertise available to us?
- Are the correct resources available to execute the contract?
- Is the delivery time acceptable and can the project be handled in the required time?
- Are the correct technical / commercial / engineering resources available for the quote?
- Can we accept additional tendering costs, if they are required?

As you reviewed these questions I’m sure you saw the value of having your own list of questions before deciding to put in a proposal or bid. Build your own list of Bid / No Bid Decision Criteria.

Sample “Contents” Headings For Tendering Presentations

Following are the Content pages for two different tender proposals that Ian and Rod supplied ... compliments of Siemens Industry and Energy in order to assist small to medium size businesses when tendering. One is an in-depth tender and the other one is a simplified version.

Content: In-Depth

Section Description

1. Covering Letter
2. Completed Forms for Tender
3. Our Proposal
4. Proposed Procurement Solution
5. Proposed Warehousing Solution
6. Proposed Distribution Solution
7. Proposed Repacking Unit
8. Proposed Clinic Support on Stock Management and Supply
9. Proposed Management Information System and IT
10. Proposed Billing
11. Financial
12. General

13. Proposed Human Resource Management and Development
14. Service Level Agreement
15. Proposed Tracking and Tracing Including Vehicles, Staff and Bar Coding
16. Proposed Facilities and Maintenance Including Security
17. Company Background, Supply Chain Consulting and References

Content: Simplified

Section Description

1. Covering Letter
2. Executive Summary
3. Proposal
4. Tender form
5. Company Profile
6. Supply Chain Consulting (SCC)
7. Black Economic Empowerment (BEE)

Tendering Successes

Many small business operators think they can't win tenders with large organisations and government. Following are 3 Success Stories of many hundreds of success stories in S.A.

- Juliet Seloane left her job at a Polokwane bank in 2001 and joined up with a local business owner and opted for no controlling ownership in the business. She runs Wings Catering, a Gauteng and Limpopo Catering Company, one of Johannesburg's most successful catering firms serving the Gauteng Government. She's regarded as one of the top caterers of a database of 5 000 catering firms on The Gauteng Shared Service Centre, which controls procurement for the Provincial Gauteng Government. Seloane, 31, owns 50% of the company and runs the Gauteng operation. She also does private functions such as christenings and baby showers, mainly for the families of government employees. When she first started out, Seloane had to rent a taxi every time she made a delivery. Now she has 5 vehicles and has increased from a start-up of R9 000 to R200 000 per month. She first started catering for meetings at the Premier's Office after she submitted quotations to the preferred tender list and won. She said, "I just referred to what we were pricing in our business in Polokwane and then just went up a few rand. The biggest job she has done so far was a R90 000 function hosted by the Department of Education providing meal packs for 3 000 children.
- Daniel Mokena, through developing solid business skills, discipline and caring for his clients has grown from a three person security operation to a staff of 32 in just two years. His company is La Costa Security in Bloemfontein. Mokena had 9 years as a policeman and 2 years as an acting manager of a private security company before he went out on his own. When he first started it was "hand to mouth". Although after a year he managed to buy two bakkies and 13 radios and seven guns. Since winning a tender at the SAPS to guard three of their facilities for one year for R29 000 a month he has graduated to winning a tender with the Department of Health for R70 000 a month to guard the Universitas Hospital in Bloemfontein for a year.
- Molusi Hlatshwayo, who owns office equipment suppliers Zenzele Office Automations in Soweto has increased his turnover nine fold and his employees from three to 28 in 8 years. Even though he is on the Gauteng GT10 preferred tender list which the Provincial Government draws from, he says he managed to increase his orders from the first to the second year by actively going out to district offices to promote and market himself. According to Molusi, most of the guys will sit with a tender and wait for the order, but "we go there and market the tender". His philosophy is "... Don't sell the product, sell yourself, because people buy from people." Over 80% of his business comes from government departments and most of it is made on repairing equipment.

Note:

As a small or medium size business look for strategic partners or ways several small service providers can collaborate to win tenders. Big Business and Government wants to award you the business but you have to be able to deliver. On the bigger contracts you'll often need other people with additional experience, products and services.

Note:

- In early 2004 Business Day put out a Four Part Series of small advice booklets on tendering. These publications were developed by The Services Seta, %Real Business in Business Day and CBM Training. This four-part Real Business series on Winning Tenders is linked to an interactive education program aimed at assisting you in preparing professional tenders that will have a better chance of winning contracts for your business. The series consist of the following topics: 1) The Ground Rules 2) Post-Tender Procedures 3) Preparing the Tender Document 4) Nailing that Government Contract . They also do seminars and workshops on the subject. You may want to contact them to try and get a copy of the booklets or attend one of their workshops.
They can be contacted at: 0860-262626
fax number –(0 11) 328 2095
www.businessday.co.za
- Also, Ntsika Enterprise Promotions Agency supports Tender Advice Centres throughout S.A. You can contact Ntsika for more details: Ntsika Enterprise Promotion Agency
Tel: 27-12-483-2000 / Fax: 27-12-341-1929
Helpline: 0800-113-857 (toll free)
Website: www.ntsika.co.za
- Cenbis (Centurion Business Centre): Tender advice centre based in Centurion offering financial support, assistance with business plans, tendering and training. It has four municipal help-desks to assist in the dispersal of tenders for the Tshwane Metropole.
Tel: 27-12-664-8171
E-mail: cenbis@ctc.co.za
- Enterprise S.A.: A Tshwane based centre which offers business owners tender advice, workshops and affordable courses.
Tel: 27-12-338-0520
E-mail: jullian@enterprisesat.co.za
- Beehive Witbank: Tender training workshops and micro-loans of between R500 and R10 000 are offered. However there are no business advisors on site and they have to travel in specially from Lydenburg.
Tel: 27-13-656-0840
- Fabcos Trust: Tender advice centre that acts as a business referral site and offers monthly workshops on procurement as well as other business issues.
Tel: 27-11-333-1111
- Entrepreneurial Centre: Offers training, including management, costing and tendering, mentorship and network and business linkage opportunities.
Tel: 27-12-703-6197
- Business Skills S.A.: Runs affordable short workshops and five-day training courses on management, costing, tendering and marketing:
Tel: 27-12-349-1777
- TradeWorld, best known to small businesses for the tender information that they send to subscribers, has launched a refurbished website which contains several new tools for registered users. TradeWorld sends tender information and requests-for-quotations, mostly from government, via email or fax to businesses that subscribe to the service.
The tendering organisation also has a strong international business component.
TradeWorld's new website is now neatly laid out, uncluttered and divided into a local South African trade (TradWorld) and global trade for exporters (SA Exporter) and is colour-coded accordingly. Along with the usual tender opportunities, procurement database and international and local trade directories, the local trade site also includes new and helpful tools such as business basics, a section which provides business owners with tips and guidelines on running a business.
Quite important is the fact that the procurement and supplier database are also more geared towards black-owned businesses.
To contact TradeWorld: E-mail: info@tradeworld.net
Website: www.tradeworld.net

Good luck with your Tendering!

Sample Sales Proposal

As mentioned earlier, I have mocked up a sales proposal very similar to the ones I used in the broadcast industry that gave me above 80% close ratio. The close ratio was very high because I usually did one of these proposals after I did an extensive Marketing Questionnaire with the client. (Needs Analysis).

In other words, if someone got this proposal I had already confirmed they had the **need** and the **ability**. This is why Module 1 to 7 are so important. These modules help you qualify the client. Module 6 which includes the needs analysis, allows you to take the qualifying even further through an in-depth interview. Once again 90% Preparation and 10% Perspiration.

Before completing Exercise 3 to 7 review the sample proposal.

Summary:

Once you have thoroughly worked through this module you will now;

1. Know the difference between Features and Benefits
2. Have Identified Benefits about Features in reference to your products, services, yourself and your company.
3. Be more effective at second person selling.
4. Give Stronger Group Presentations and develop more effective written proposals.

You may want to go through this "Mock up" proposal and through the one on the Ultimate Corporate Citizenship Program and see what principles and strategies and tactics were involved to make them so powerful. Use the guideline on writing a Business Proposal. All the things I suggest are not in these proposals, but I believe the main success factors are. The Ultimate Corporate Citizenship Program Sales Proposal was a proposal written for a T.V. Educational Network to gain a large contract from a Bank. Names, places, names of courses, financial figures, etc. were changed to respect the confidentiality of this proposal.

Also, there are two more sample sales proposals from the office machine industry place behind the Ultimate Corporate Citizenship Program Sales Proposal. The two proposals demonstrate another effective format for proposals.

Exercise 3: Group Presentation

Take a product, service or concept that you sell and put together a 20 minute presentation, utilising either overhead transparencies, Power Point or a flip chart.

Make this presentation to your classmates on this program or to an audience of associates on the job. If you have the time you may want to add graphics, etc. if the trainer has decided to do this exercise in class you may use handwritten overheads, etc. Review the Group Presentation Guide. Consider setting up the room to your liking, etc. have your associates evaluate you and your presentation based on the guide.

Exercise 4: Attention – Written Proposal

Review the Attention section. Search for or create criteria that if followed, really add credibility to the presentation on your product, services or concepts. Write up the criteria in point form, similar to examples.

Example 5: Writing a Written Proposal

Take written proposals you have made in the past or someone else has used with a client and assess it for the following:

1. The points etc. that was effective.
2. Where it could be improved based on the information in this module.

Example 6:

Construct your own written proposal format that you would like to follow. This can be done in point form.

Review with your associates, classmates and/or instructor, manager.

Exercise 7:

Utilise all the information you have reviewed and write a written proposal to a client. Let your trainer and/or manager review this with you. Be prepared to persuade them of the viability of your approach.

A

Winning

Advertising / Marketing

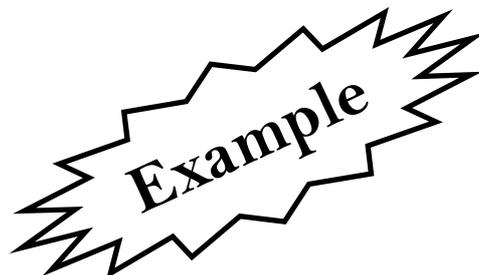
Strategy For

XYZ Tyre Co.

Date: February 23, 1997

Presented To: Frank Smith

President



A C 101 FM PRESENTATION

C101 FM

101 Main Street

Victoria, B.C.

Canada V6L2Z4

Phone Number: 604-253-2221 Fax Number: 604-253-2220



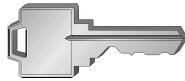
Table Of Contents

- **The Five Keys To Profitable Advertising**
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- **Your Creativity**
- **Your Frequency**
- **Your Reach**
- **Recommended Start**
- **About C101 FM**
- **About Your Representative**

The Five Keys to Profitable Advertising



Positioning



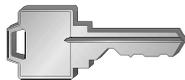
Strategy



Creativity



Frequency



Reach

These five major concepts form the base of nearly every profitable marketing program: **Positioning, Strategy, Creativity, Frequency** and **Reach**. A costly common oversight by many marketing people is to neglect these basic five sure-fire principles. These five combined or used separately apply not only to advertising. The five should be used in all other factors of your marketing program, such as the internal and external appearance of your business and the all-important face-to-face communication with your customers. Lets take a look at these five major concepts and what they mean.



1. POSITIONING

I am sure you have walked into a restaurant or store and immediately decided it was not for you because it did not feel right. The business obviously was not positioned correctly for you. You have also experienced walking into a place and said, "I love it, it feels so comfortable." This business is obviously positioned right for you. The idea behind positioning is simple. First position your promotion program by determining everything you can about your customer. Secondly, always remember - the market or customer you need to reach with your message is the one customer most apt to buy from you. There are a number of other considerations which will help you to establish a position, such as the nature of your products, special services, visual character of the store, decor, sales approach, image, and location, to name a few. The more specific your positioning, the more effectively you can direct your promotion program at your target market.



2. STRATEGY

Small armies have defeated big armies and small enterprises have gained quickly on much larger companies by using effective strategies. Carefully determine your strategy based on your advantages, your market and your competition. A relatively small competitor, for example, may decide to concentrate promotional impact on specific days of the month. A clothing retailer may advertise heavily for five days of the month to capture the bulk of the market for only those few days. By initially promoting heavily in one time period rather than weakly spreading the ad dollars over the month, a business can gradually increase their market share without a major budget increase. Of course, as profits grow, a greater percentage of advertising dollars are available to speed the increase of sales. And keep in mind, your strategy can help determine your choice of promotion, media, sales techniques and the timing and frequency of your advertising.



3. CREATIVITY

Your creativity flows naturally from your strategy and your positioning. It must speak directly to these two principles when describing your company and competitive edge with words, graphics and music. An important factor to remember is that the creative content of your marketing must be sales oriented. I have seen clients win awards for creativity of advertisements that produced minimal impact on the market place. Do not worry about trying to make an ad into an artistic visual masterpiece. It is more important to promote a strong benefit to the consumer in every ad.



4. FREQUENCY

It is better to reach 10 000 of the right target groups of potential customers 10 times with the right message in advertising than it is 100 000 people once. This is frequency. The mind must hear, see or experience something several times to establish recall.



5. REACH

Once frequency level is established then reach is a matter of budget. Reach would be the total number of different people you would reach with your advertising in a given period. You should not try to increase your reach until you know you are achieving enough frequency with the people you are reaching now.

Your Positioning

Based on the information gathered during our needs analysis with you two weeks ago and the research we have done in the local market place, aspects of your positioning as a retail tyre* business are:

- You are a quality, reputable tyre store. You are not seen as a discount outlet.
- Your breadth and depth of merchandise appeals both to those driving high performance vehicles and those wanting a quality, reliable product backed with unconditional guaranteed service.
- Your market segments in order of importance seem to be:

Men 25 - 49 Years Of Age:

Blue collar and white collar, good incomes, family people, active sports and armchair sports.

Men 18 - 25 Years Of Age:

Blue collar, good income, single and newly married, love their cars, into high performance, sports minded.

Working Women: 25 - 34 Years Of Age:

These women are career ladies with good income. They are a mixture of married and single, but upwardly mobile, very involved in fitness, looking good, style, fashion and cars that suit the image.

There is a splintering of other demographics and psychographics types but these are the three main markets.

Based on this your position needs to continue to be:

"A highly professional team of people, excellent value for the money invested, personal service, the best assortment of tyres, wheels etc. and a modern upbeat solid company where your safety is in good hands."

Your Strategy

There are a number of competitors in the market place. Company A and Company B are focusing on the industrial and light commercial market. Companies C, D and F are discount stores. Company G and H are high performance shops and Companies I, J, and K are family oriented.

In the family market you seem to be running number one but in the high performance market, at number three. The working women 25 - 34 prefers you above the rest.

The strategy over the next year that we suggest is as follows:

- **Continue to penetrate that 25 - 49 male market with the following:**
 - Hold the 7.55am sports cast six days a week.
 - Have "The Dobber" our sports caster be your spokesperson and endorser.
 - Co-sponsor the "Shoots He Scores" package with the Victoria Tigers so at half time of each game, Victoria Tyre and C101FM host the shoot-out at centre court. Average attendance per game: 8 000 avid fans.
- **Reach the 18 - 24 male market with the following:**
 - Utilise the above three tactics.
 - Sponsor the Entertainment Tonight reports that are broadcasted Monday to Sunday at 6:05pm, 7:05pm and 8:05pm. The 18 - 24 male market are the movie goers and the night club crowd.
- **Reach the 25 - 34 working woman with the following:**
 - Entertainment tonight reports.
 - Run two commercials on the working woman talk show from 6 - 7pm. Monday, Wednesday and Fridays.
- Reserve an advertising budget for last minute commercials to capitalise on unexpected snow storms in the early part of the winter. Four days at 12 commercials per day should be ample.



Your Creativity

- The Dobber will voice the commercials that run on the 7:55am sport cast. There will be six commercials produced every six weeks as image commercials to be run when there is no special sale, special event or special message.
- The “Shoots he Scores” report will be recorded live by the Dobber who announces the “live” hockey reports from the arena. This will happen at approximately 9:15pm between the second and third period.
- Victoria Tyre will be identified on the 30 promotional spots per week that promote the “Shoots the scores” event.
- The entertainment tonight commercials will be voiced by Brandy Lee, the on-air lady who voices the Entertainment Tonight reports. These commercials will be more upbeat than the Dobber’s Commercials. Brandy will also voice the commercials that run on the working woman talk show.
- Special sale commercials should be pre-produced just before winter starts so they can be run on radio at a minute’s notice to capitalise on a snow storm.
- As a sponsor of the “shoots the scores” package the Victoria Tyre logo and name will be on the four locations on the ice rink boards in the arena, as well as in the poster displayed at the Royal Bank branches, in your store and in our weekly newspaper ad. The Dobber’s picture will be part of the add as well.
- Demo Commercials have been produced for you to hear. They represent the quality and creativity our production department is capable of creating.

Your Frequency And Your Reach

Our research analysis shows that you will receive the following weekly reach and frequency with your target group based on the schedules suggested in your strategy. This comes from the BBM figures that were extracted through the IMA Computer System.

Target Group	Reach	Frequency
Men 25 - 49	52 500	6.5 times per week
Men 18 - 24	35 000	7.5 times per week
Working Woman	22 000	8.5 times per week
Total Audience	210 000	5.2 times per week

Additional Reach

The best way to advertise is to ensure that you first reach a reasonable level of frequency to make enough impact to get people to absorb the information in your commercial and move to action. In other words it is better to reach 20 000 of the right people 10 times with the right message than 200 000 people once.

I am suggesting you use C101FM as your flag ship. C101FM will not and cannot reach your entire market. Once you have got the frequency on C101FM built up to a workable level, then expand your reach to additional listener, reader or viewer market. Our suggestion would be the following media, depending on your advertising budget. They are as follows in sequence of most value to you.

1. The Victoria Times Columnist Newspaper
2. The Auto Trader Monthly Paper
3. CKJA Radio

If you utilise the Dobber in those ads it will have continuity with your investment with us and create even more frequency.

Recommended Start

Following is the suggested schedule of production and preparation leading up to the start date of your on annual air advertising campaign with C101FM.

- **Week of March 8th:**

Gather information and write the commercials for the -

- 7:55am sportscast
- Entertainment Tonight
- Working Woman Talk Show

- **Week of March 15th:**

Final approval on the commercials.

- **Week of March 22nd:**

Advertisement starts on:

- 7:55am sportscast
- Entertainment Tonight
- Working Woman Talk Show

- **Week of September 22nd:**

Posters, identification package, etc. complete for the "Shoot the scores" ice hockey package. Season starts October 15th.

- **Week of October 15th:**

Last minute sale commercials produced and put in reserve for the first winter storms.

Final Words

Once you have approved the exact campaign and the level of advertising investment we will immediately get started.

We will hold the options for you on the 7:55am sportscast sponsorship and the commercial time spots in Entertainment Tonight and Working Woman, as wells as the "Shoots the scores" sponsorship until Monday, March 1st.



We are looking forward to developing a long term, mutually profitable and satisfying relationship with you, your people and your business. A business as well respected as yours being heard on our air waves is also a benefit to us.

About C101FM

C101FM has been present in the Victoria market place for over 25 years. It was the first FM station to start up in Victoria.

C101FM is rated as the #1 Radio Station in the market with a total audience of 210 000 listeners.

In the past year the station was awarded the Corporate Citizen of the Year by the Greater Victoria Chamber of Commerce. The station was also awarded the prestigious award as "The Most Community Oriented Station" in Canada by the Canadian Association of Broadcasters. The creative department also won two of the top ten creative awards presented to Radio Stations across Canada by the Radio Advertising Bureau.

The Christmas Daddy's show last year raised a record of \$650 000 to help the needy at Christmas.

The package "What people say about C101FM" of quotes, awards and reference letters confirm the results both our advertising clients and listeners have and do receive from C101FM.

About Your Representative

Bill Gibson is your representative. Bill has been awarded the Sales Marketers annual award this year by the Sales Marketing Executives of Victoria.

Last year the Radio Advertising Bureau borrowed Bill from C101FM and toured him across Canada to show other broadcasters how to get real action for their clients with the needs analysis approach to marketing radio.

He is a member of SME-Victoria, past president of the Lions Club, Chairperson for the educational committee of the Greater Victoria Chamber of Commerce and top producer in the Rembrandt Chain of 65 radio stations.

He teaches marketing twice a week at Green Hill Business College and still finds time for his wife Beverley and two sons Ryan and Shane.

His radio clients include Mac Donalds Restaurant, Boyd Chev & Olds, Century 21 Real Estate, Simpson Sears, Hillside Shopping Centre, A & B Sound and a host of others.

Bill is known for his super service philosophy and unprecedented innovativeness in advertising and promotion.

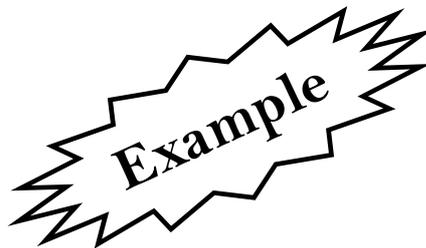
The quotes, awards and reference letters under separate cover titled "What People Say About Bill Gibson", will help confirm for you that you are in more than just good hands with C101FM advertising representative Bill Gibson.

Bill's office phone number is: 604-253-2221
fax number is: 604-253-2220
cellular number is: 604-266-1000

Bill would also like you to have his personal home phone number and would like you to use it if you feel a need to: 604-268-1222

XYZ Tire Co

Advertising Investment



Date: February 23, 1997

Presented To: Frank Smith

President

Presented By: Bill Gibson

Account Executive

A C101 FM PRESENTATION

C101 FM

101 Main Street

Victoria, B.C.

Canada V6L2Z4

Phone Number: 604-253-2221 Fax Number: 604-253-2220



Your Advertising Investment

We have provided you with three options to choose from. Combinations of these options are available.

- **The Rolls Royce Strategy**
- **The BMW Strategy**
- **The Volkswagen Strategy**

The Rolls Royce Strategy

This is the schedule and campaign that will give you real impact with your target groups identified earlier.

1. 7:55am Sportscast - You own it

You receive 6 - 60 second commercials p/w

12 - 15 second I.D's p/w

before and after the sportscast

Your investment

$$6 \times \$80.00 = \$480.00 \text{ p/w} \times 52 = \$24,960.00$$

2. Entertainment Tonight Reports

You receive 21 - 30 seconds commercials p/w

21 - 5 second I.D's before the report

Your investment

$$21 \times \$25.00 = 525 \text{ p/w} \times 52 = \$27,300.00$$

3. Working Woman Talk Show

You receive 6 - 30 seconds commercials p/w

Your investment

$$6 \times 35.00 = 210 \text{ p/w} \times 52 = \$10,920.00$$



4. He shoots he scores sponsorship

October 15 - April 15

You receive 4 - 30 seconds commercials p/w

(2 Hockey Games)

20 - 5 second I.D. Sponsorship per week

Advertising in the Arena

Posters

Your investment

\$250.00 per week x 26 weeks = \$6 500.00

5. The Dobber - Spokesperson on C101FM

400 per month x 12 = \$4 800.00

6. The Dobber Spokesperson in all other mediums

200 per month x 12 = \$2 400.00

7. Last Minute Snow Storm Commercials

12 x 4 days = 48 @ 30.00 = \$1 440.00

Total Advertising Investment **\$78 320.00**



Monthly Advertising Budget

	1	2	3	4	5	6	7	Total
March	520.00	568.75	227.50		100.00	50.00		1466.25
April	2080.00	2275.00	910.00		400.00	200.00		5865.00
May	2080.00	2275.00	910.00		400.00	200.00		5865.00
June	2080.00	2275.00	910.00		400.00	200.00		5865.00
July	2080.00	2275.00	910.00		400.00	200.00		5865.00
August	2080.00	2275.00	910.00		400.00	200.00		5865.00
September	2080.00	2275.00	910.00		400.00	200.00		5865.00
October	2080.00	2275.00	910.00	1000.00	400.00	200.00		6865.00
November	2080.00	2275.00	910.00	1000.00	400.00	200.00	1440.00	8305.00
December	2080.00	2275.00	910.00	1000.00	400.00	200.00		6865.00
January	2080.00	2275.00	910.00	1000.00	400.00	200.00		6865.00
February	2080.00	2275.00	910.00	1000.00	400.00	200.00		6865.00
March	1560.00	1706.25	682.50	100.00	300.00	150.00		5398.75
April				500.00				500

Over a full year of advertising your daily investment works out to \$220.60 per day.

Your tracking system last year in the month of October indicated that the one month Winter Safety Campaign moved 30 sets of tyres per day at an average price per set of \$360.00. At \$220.60 investment for \$10 800 in sales is just over 2% of the gross revenue for advertising. The industry norm is 3.8%. You are well within the norm for the industry, based on last October's sales with this years investment.

The Rolls Royce Strategy will give you the following Reach and Frequency results:

Target Group	Reach	Frequency
Men 25 - 49	52 500	6.5 times per week
Men 18 - 24	35 000	7.5 times per week
Working Woman 25 - 34	22 000	8.5 times per week
Total Audience	180 000	5.2 times per week



The BMW Strategy

The following schedule and campaign is a reduced Rolls Royce Strategy, but it is still high powered and streamlined. It has less focus on the 25- 34 age Working Woman (We have not included the working woman talk show) and we lightened the frequency on the 18 - 49 males by not including "He Shoots He Scores" sponsorship.

1. 7:55am Sportscast - You own it

You receive 6 - 60 second commercials p/w

12 - 15 second I.D's p/w

before and after the sportscast

Your investment

6 x \$80.00 = \$480.00 p/w x 52 = \$24 960.00

2. Entertainment Tonight Reports

You receive 21 - 30 seconds commercials p/w

21 - 5 second I.D's before the report

Your investment

21 x \$25.00 = 525 p/w x 52 = \$27 300.00

3. The Dobber - Spokesperson on C101FM

400 per month x 12 = \$4 800.00

4. The Dobber Spokesperson in all other media

200 per month x 12 = \$2 400.00

5. Last Minute Snow Storm Commercials

12 x 4 days = 48 @ 30.00 = \$1 440.00

Total Advertising Investment \$60 900.00



Monthly Advertising Budget

	1	2	3	4	5	Total
March	520.00	568.75	100.00	50.00		1238.75
April	2080.00	2275.00	400.00	200.00		4955.00
May	2080.00	2275.00	400.00	200.00		4955.00
June	2080.00	2275.00	400.00	200.00		4955.00
July	2080.00	2275.00	400.00	200.00		4955.00
August	2080.00	2275.00	400.00	200.00		4955.00
September	2080.00	2275.00	400.00	200.00		4955.00
October	2080.00	2275.00	400.00	200.00		4955.00
November	2080.00	2275.00	400.00	200.00	1440.00	6395.00
December	2080.00	2275.00	400.00	200.00		4955.00
January	2080.00	2275.00	400.00	200.00		4955.00
February	2080.00	2275.00	400.00	200.00		4955.00
March	1560.00	1706.25	300.00	150.00		4955.00

The BMW Strategy will give you the following reach and frequency results:

Target Group	Reach	Frequency
Men 25 - 49	48 000	5.5 times per week
Men 18 - 24	26 000	6 times per week
Working Woman 25 - 34	17 000	5.5 times per week
Total Audience	160 000	4.1 times per week



The Volkswagen Strategy

The 25 - 49 male audience, 18 - 24 male audience and 25 - 34 female audience can be still effectively reached through an even more scaled down plan. Following is the Volkswagen Strategy.

1. 7:55am Sportscast - You own it

You receive 6 - 60 second commercials p/w

12 - 15 second I.D's p/w

before and after the sportscast

Your investment

6 x \$80.00 = \$480.00 p/w x 52 = \$24 960.00

2. Entertainment Tonight Reports

You receive 21 - 30 seconds commercials p/w

21 - 5 second I.D's before the report

Your investment

21 x \$25.00 = 525 p/w x 52 = \$27 300.00

3. Last Minute Show Storm Commercials

12 x 4 days = 48 @ 30.00 = \$1 440.00

Total Advertising Investment \$53 700.00



Monthly Advertising Budget

	1	2	5	Total
March	520.00	568.75		1088.75
April	2080.00	2275.00		4355.00
May	2080.00	2275.00		4355.00
June	2080.00	2275.00		4355.00
July	2080.00	2275.00		4355.00
August	2080.00	2275.00		4355.00
September	2080.00	2275.00		4355.00
October	2080.00	2275.00		4355.00
November	2080.00	2275.00	1440.00	5795.00
December	2080.00	2275.00		4355.00
January	2080.00	2275.00		4355.00
February	2080.00	2275.00		4355.00
March	1560.00	1706.25		3266.25

The Volkswagen Strategy will give you the following reach and frequency results:

Target Group	Reach	Frequency
Men 25 - 49	42 000	4.8 times per week
Men 18 - 24	24 000	5.5 times per week
Working Woman 25 - 34	15 000	5 times per week
Total Audience	148 000	3.8 times per week

Summary

Following are the benefits and advantages we see for Victoria Tyre Co. by being involved in the strategy of your choice with C101FM.

- You reach your target group while they are in their cars and that is the “number one” time people think of safety and tyres.
- You will own the 7:55am sportscast, a prestigious effective position on the radio station. You have first right of refusal at the end of the 52 weeks.



- You have narrowed your radio advertising buy into time slots to get enough frequency with your target groups to see results from listeners.
- You have the choice to have The Dobber exclusively for Tyre Stores as a spokesperson. The Dobber is not only respected in this market, he also has a syndicated program that runs on 35 other radio stations.
- C101FM is a highly respected community oriented company. Victoria Tyre will be seen as a partner with the radio station with “He shoots, he scores” and entertainment tonight.

C101FM’s Commitment

C101FM commits and promises to do the following things for Victoria Tyre* Co. throughout the duration of our relationship:

- Senior Management namely the President and the General Manager will visit once a quarter with the President and the General Manager of Victoria Tyre to discuss business and ensure Victoria Tyre is happy as a customer.
- The Sales Department will conduct four customers audits throughout the year.
- Victoria Tyre will be given a Co-host position in the C101FM sports box on four occasions throughout the hockey season. That means all the guests will be guests of Victoria Tyre.
- All staff at Victoria Tyre will be wished Happy Birthday on the air and sent the C101FM Birthday Package.
- Commercials will be updated a minimum of every six weeks.
- C101FM will purchase tyres for a minimum of two of their vehicles over the time period.
- C101FM wants Victoria Tyre to become one of our main advertisers. Our commitment is to do what it takes to deliver the results you need.
- We are looking forward to a positive response to this sales presentation and advertising investment proposal. Thank you for your time and interest. May the relationship be prosperous and fulfilling.

Module 8

Handling Objections And Concerns

Learning And Sales Development Outcomes

In this module you will:

1. Learn a tried and proven process that will improve your ability to handle objections, concerns and questions from Prospects and Clients.
2. Be given 7 Objection Handling Strategies.
3. Be able to categorise the different types of objections and concerns.
4. Develop specific Objection Handling Strategies for specific Objections and Concerns

***Ntsika Enterprise Promotion Agency,
with a focus of rendering non-financial support to SMME's
is part of The Department of Trade and Industry in South Africa.
Ntsika, along with the support of The European Union
assisted in the Initial Development of the
Boosting Sales & Profits With Focus Selling program
in conjunction with Knowledge Brokers International Limited.***

Module 8

Handling Objections And Concerns

Preparation! Preparation! Preparation! Preparation! Preparation!

If I were to let you know what a clients objection, concern, question or complaint was going to be two days in advance of meeting her, you could easily handle the situation. The reason why, would be cause you had time to prepare and come up with some answers. In my opinion objection handling is about being prepared.

Implement the following 5 Point Process for Handling Objections and you will handle most objections, problems, complaints, questions, scenarios and situations with ease.

1. Brainstorm with your colleagues all the possible objections, problems, concerns, complaints, questions, situations, scenarios, challenges and hurdles that have gotten in the way, hindered or slowed down the sales process or buying process. Think of all the ones you've had in the past, are happening now or could happen in the future.
2. Take this list and prioritise them from the most common to the least common.
3. Then brainstorm 4 to 5 Solutions and Answers for each one of these Objections, Questions, Situations, and Concerns etc.
4. Build a list of the Objections and the Solutions and Answers for each Objection. Post them where you can see them. Carry them in your Fila Fax or on your computer.
5. Review them regularly. If you are a sales manager or business owner ... continually test your team and give small rewards for the right answers. You could have "objections of the day" at your sales meetings. You must keep the answers at the top of your mind and on the tip of your tongue.

We do a lot of work with Financial Advisers in South Africa. Following is a list of 22 different objections, concerns, statements that Financial Advisers often get from potential clients when they are making initial contact. We then are making initial contact. We then took the first one and have put together a list of alternatives for handling that one initial contact objection so you can see how it is done and why the process works.

22 Different Objections A Financial Adviser May Get On The Phone During An Initial Approach

- 1) I already have a Financial Adviser (Broker) and / or I've already got someone looking after my Portfolio and I'm happy with it.
- 2) I've already had a needs analysis done.
- 3) I've been dealing with XYZ Assurance and I don't intend taking a policy with your company.
- 4) I'm already dealing with and XYZ Agent.
- 5) The Financial Adviser from your company came and sold me and then disappeared. Why would I want to see anyone from your company?
- 6) I am disappointed with your company.
- 7) The results on my investment with Insurance Companies have been horrible. I'd rather put my money elsewhere.
- 8) Are you selling something?
- 9) Is it Life Assurance you are trying to sell me?
- 10) Do you have any idea the number of Insurance Salespeople and Tele-marketers call me? I'm tired of it. I can't even eat my dinner without being disturbed. I hate these calls. It is inconsiderate.
- 11) Send me some information first.
- 12) I'm too busy to talk to you right now.
- 13) I'm just too busy to see you.
- 14) Yes, I do mind if you ask me some questions.
- 15) You will be wasting your time.
- 16) My husband looks after the financial planning in our family.
- 17) What will it cost me?
- 18) My (husband, wife, etc.) died already.
- 19) Right now I've got no money to buy anything.
- 20) I'm over insured.
- 21) I'm paying more on Life Cover, Medical and towards my retirement than I can afford. I don't need any more.
- 22) I don't even know you! Why should I give you an appointment with me?

Fourteen Different Ways To Respond To Initial Contact Objection #1

1. 'I already have a Financial Advisor (Broker) or I've already got someone looking after my Portfolio and I'm happy with him.'

- 1.1 **FA:** When last did your broker review your Portfolio?
Prospect: Six months ago.

- FA:** There has been a major change in the strengthening of the Rand and interest rates have dropped to an all time low in the last 6 months. There is a good chance there should be some adjustments made to your Portfolio because of that. Why don't I have a look for you and see what adjustments should be made. You can only benefit.
- 1.2 FA:** How often does your Broker contact you?
Prospect: Twice a year.
FA: My clients of your caliber hear from me a minimum of 6 times a year. With all the new and continued changes to the tax legislation, the changes in interest rates and rand value and changes in personal and family situations, I believe it is important to treat my client's portfolios as if it were my own. I'm reviewing my situation almost monthly. Let me come and show you my unique and beneficial approach to Financial Planning and Personal Risk Reduction.
Your only investment is a few minutes of your time.
- 1.3 FA:** Are you happy with your Broker?
Prospect: Yes I am.
FA: On a scale of 1 to 10 with 10 being ecstatic about the job your broker is doing, what number would you give him?
Prospect: About an 8.
FA: What was it that stopped you from giving the Broker a 10?
Prospect: Sometimes I get the feeling he is more of a salesman than an Adviser to me.
FA: And, is there anything else you would add?
Prospect: I seem to be paying a little too much for medical.
FA: Mr. Prospect, I'm part of a special project at our company that is made up of a New Generation of Financial Advisors. From day one we are coached and shown how to do a full and complete Personal Financial Analysis with every client. Then that information is put through our computers and recommendations are made, keeping in mind the new legislation that is there is to ensure that you the client receive what is best for your situation. Once I receive the recommendation, I then run it past experienced Financial Advisers and our internal resource people to fine tune it.
Allow me to show you what our service looks like. I'm not asking you to change Financial Advisers. I'm asking you to take personal control of your own Financial Future and look at the options to make sure you are getting the best you deserve. I'm sure you work hard for your money. When can I come and see you? I'm open the latter part of next week.
- 1.4 FA:** It is good to have a second opinion to compare.
- 1.5 FA:** Mrs. Prospect, when you buy a fridge or stove, do you look at several, in other words do you believe in comparison shopping, especially with substantial investments like buying a home, buying a car, buying appliances or even joining a health club.
Prospect: Yes, I do.
FA: The purchasing of Life Cover, Medical Cover and investing in your future can be a substantial amount of money. What I'm suggesting is that you at least allow me to meet with you so you can compare to ensure you are getting the most up-to-date value for your money. When would it be convenient for you and I to meet?
- 1.6 FA:** What I present is "state of the art". Give me the opportunity to present something unique and different.
- 1.7 FA:** I would certainly not duplicate what your Broker has done. Every Financial Plan is specific to that client. It is like your fingerprint. No one else has a fingerprint identical to yours.
- 1.8 FA:** Would you like to have a second opinion ... you can only benefit by it and it will cost you nothing.
- 1.9 FA:** Can I come and look at the Financial Plan and see if there are areas that could be improved?
- 1.10FA:** Has your Broker talked about the Generation X Products?
Prospect: What is that?
FA: For example, how many children do you have?
Prospect: Three.
FA: You can pay medical for one and the other two are free. Did you know about that?
Prospect: No.
FA: That is only an example of one area where I may be able to help you save money. Can I come and see you?
FA: That is great! You obviously believe in planning for the future. Do you pay into a Provident Fund at work?
Prospect: Yes, I do.
FA: How far away are you from retirement?
Prospect: 5 years.

- FA:** Did you know that 5 years from now, you'll most likely receive a "Good-buy" cheque from your employers and have to manage your own fund?
- Prospect:** No.
- FA:** Let me come and talk to you about it.
- 1.11 FA:** You've heard the saying "Don't put all your eggs in one basket." Do you think that you should have all your investments and risk coverage with one person?
- Prospect:** Well, I do trust her.
- FA:** I'm sure she is trustworthy or you wouldn't be doing business with her. Would you agree with me that Professionals whether it be Medical Specialists or Financial Planners specialise in certain areas?
- Prospect:** Yes
- FA:** I'm sure your Broker is a specialist in some areas and not so strong in others. Why don't I come and see you and see where I may fill in the gaps?
- 1.13 FA:** I can respect that, but times change. The BMW you bought 3 years ago, was an excellent buy at the time, but it cannot compare to a new BMW. There are continual improvements with Industry Products. That is what I want to come and talk to you about.
- 1.14 FA:** If I were to promise you that I wouldn't try and move the business away from your present Financial Adviser, but would only look at what has been done and make additional recommendations, would you see me?

Putting The Process To Work In The Broadcast Advertising Business

In the Broadcast Advertising Business we had a list of 20 to 30 common objections, questions and concerns that clients had. I will take one of those and demonstrate several alternatives.

The Objection:

The economy is in a slump, people are not buying ... it would be a waste of many to advertise

Possible Responses:

Response #1

Rep: Did you know the best time to gain market share is at the bottom of an economic cycle.

Client: Why do you say that?

Rep: Most people feel like you feel and stop proactively going after the business. We both know that there are a certain number of people still buying ... but not as many as in good times. It is now much easier to dominate the airwaves and make an impact without your competitors battling for their attention. Most major market share take-overs have happened in a down cycle because it is easier. When the market heats off ... you're already in position to really clean up.

Response #2

Rep: Unfortunately the situation won't change like most situations in life, unless we put an action plan together and implement. May I show you the kind of promotions that are proven to work extremely well in tough times.

Response #3

Rep: There still are some people buying and I'd like to see you at least get your share because you've still got overheads. Let me share with you what some of my clients have done to get their share in these times.

Response #4

Rep: I can appreciate how you feel. It has got to be frustrating.

Client: It sure is.

Rep: Let me share some research with you on how 10 Companies utilised a combination of Advertising and Guerilla Marketing Tactics to move to #1 positions in tough markets.

Response #5

Rep: A number of my clients were feeling the same way until we devised a strategy to get people buying. Can I share with you how they did it?

When it comes to handling objections and concerns it is all about preparation. It is 90% Preparation and 10% Perspiration.

The Skills

By practicing the communication skills, methods and techniques previously learned in this program, you will find that the number of objections that come up in selling will gradually decrease. You will have shown the customers results they desire and you will have appealed to their buying motives and developed a trusting relationship.

You will be turned down less in the early part of the interview because you will have broken the ice in a manner that will make the prospect want to hear the whole story.

By absorbing the proper information, you will be able to answer most customer questions before they are brought up, in most cases.

Proper accentuating of features and clearly outlining the benefits will also reduce the objection type questions.

"Remember, if there were no objections, there would be no need for salespeople."

The Three Musts of Handling Objections

1. Plan Your Selling To Keep Out Objections
2. Be Constructive When Handling The Questions
3. Adopt The Right Attitude

1. Planning Your Selling To Keep Objections Out

Pre-Empty The Objections

Spend some time with your co-workers and determine the most common objections you get in your business or with certain products or services. Include the answers to these objections in your sales presentation so that you can cover them before they come up. I call this pre-empting the objection.

As a public speaker and trainer from Canada doing a lot of work in South Africa, some common objections would be:

Objection: You are just a quick "in and out" speaker. You are not here to really help South Africa."

Objection: The cost of travel from Canada to South Africa prohibits us hiring you.

Automatically in my verbal or written presentation I mention the concern of South Africans about "in and out" speakers and trainers. Then I explain that I've been here about 90% of my time for the past several years. Also I charge one rate and I count on myself getting lots of contracts so that no individual client has to budget for travel and accommodation if I were coming from Canada.

It is good to cover these kind of objections because the client may not bring it up when you are there and they may assume it is a problem when it is not.

Another example could be a car salesperson selling a big car. The objection would be gasoline or petrol consumption.

The salesperson may pre-empt by saying: "As you can see this is a big car and it can comfortably hold six adults. Would you believe it gets the same mileage or kilometers per liter as the VW Jetta, but has more power.

Be Clear And Complete

Also use clear and understandable language so that the customer understands easily. Many objections are caused by misunderstanding. Take no chances. Make your sales talk both complete and clear.

It is important to watch facial expressions, body language and tone of voice to detect any uncertainty with the client.

Ask questions like:

- "Is this clear to you?"
- "Could you give me some feedback on what I have just said. I want to be sure I am explaining this clearly."

Turn Them Into Selling Points

Try to make selling points out of the objections you are covering. This is where you need to use lateral thinking.

An objection in reference to the purchasing of The Complete Sales Action System could be that the videos in each module do not have stops on them. In the written presentation this is pointed out and explained why it is a benefit.

The video portion with Bill Gibson "live" does not have stops and starts. It flows from start to finish. It educates and inspires. Once you have bought the program you can use the videos in many ways: For example;

- to start any meeting in the company;
- to use at a conference;
- to show during a corporate broadcast on your monthly televised message to your people on your TV or Cable network;
- have a single staff member take one home and review it;
- have new staff members review certain modules;

With no stops and starts on the video the trainer or sales manager is not confined to exercises that do not fit the situation and the trainer can also add pertinent material. Flexibility is important.

Be Constructive When Handling The Questions

It is not sufficient to merely answer the question. It must be answered in such a way that you not only remove the obstacle but also build up the prospect's confidence and desire to buy. It should bring you closer to the sale.

- "I understand your concern about dealing with a young banker, but there is another way of looking at it. In our entire bank of 350 branches I am the first person to be appointed as a branch manager in less than two years. This happened because of my aggressiveness in customer service and proactive solution finding for clients. You were also saying that you plan to retire in four years. I will work very well with your two sons who will be taking over."

Another example in reference to The Complete Sales Action System.

Objection: The content is not industry specific.

Answer: The traditional thought that everything in a training program needs to be industry specific to be effective is not true. In fact, when a program or lecture is based on truth principles it



will be effective anywhere. The video presentation will continually move through many industry situations. This helps salespeople see from a customer's point of view. This often changes the salesperson's attitude about how he/she operates.

The "we are different syndrome" overdone actually closes the mind, so opportunities and new ideas are missed. The ability to transfer concepts and ideas is a survival skill in today's world. The modules are flexible enough that you can create the needed specifics without losing the value of open thinking if you desire to do so. A great reason to buy!

Adopt The Right Attitude

Consider the objection as a question or a "request for information" and answer it in the same sincere way you would answer any question when you are giving information to someone. E.g.

- "I am really glad you brought this point up. I could have missed telling you how we handle this kind of a situation."
- "That is an excellent question you put to me. There are three different ways to overcome the tax problem."

An objection is an opportunity to advance a presentation towards a closed transaction. It is not an obstacle; it gives you the chance to;

1. Put across advantages of your product and/or services you might have overlooked or not made clear.
2. Point out additional sales opportunities, e.g. "That is a great question. It points out a couple of other areas where we could help you."
3. Reveal the additional things you may have to do to advance the interview. In other words, how the prospect needs to be handled to get a "yes" from him or her. What the client is thinking about, and which points are important.

When you take the right attitude towards handling objections you will never be annoyed or confused by objections. With the right attitude you calmly present the additional selling points, the answers to the questions and the information requested and roll the process closer to the closing of the sale.

The 7 Winning Objection Handling Strategies

By mastering the following Seven Objection Handling Strategies you will actually look forward to objections because of the feeling of achievement you will continually receive when you overcome the many objections with ease. Selling should be fun. Mastering the skills makes it fun.

Strategy 1: Find The Real Objection

In many cases clients will tell you what they are unsure of, what they do not like or what the hurdles are in doing business with them. Just as often clients will not give you the real reason why they are not buying. In some cases you hear an excuse instead of a real objection. In other cases it is a screen so you cannot see what is going on, and in other situations the clients themselves have not really been able to identify the real objection.

Let's look at how to handle excuses, smoke screens and unidentified objections by the client.

a) Excuses

When handling what you perceive to be an excuse, it is good to keep eye contact, ask questions and be silent enough for the other person to feel some pressure even if out of courtesy to respond. Some examples of objections that could be real but are often excuses are:

Client: "We need to get a couple of more bids."

Salesperson: "Obviously you are not totally sold on the program yet, what is it specifically that you are hesitating about?"

or

"Is it the actual price that is making you hesitate? There are a couple of other options that could make the financial package easier to handle."

or

"Is there another reason that is holding you back at this time?"

or

"Be honest with me, what is the real reason you are delaying the decision."

b) Smoke Screens

In this case the client uses time as a smoke screen because he may be embarrassed that cash flow is tight. You move directly to the issue, on a hunch. Trust your intuition.

Client: "I really do not have the time to register and take that course."

Salesperson: "If it is the money that concerns you we can let you pay for it over six months." The next approach gets it out in the open where you can deal with it. Some re-presenting and re-selling is needed.

Clients: "This is not the kind of packaging that my boss would be interested in."

Salesperson: "It sounds to me like maybe you are not fully sold on what I am proposing. Is that so?" Another approach would be:

Salesperson: "And what is it specifically your boss would not be happy about?"

Note: Through this approach you are identifying real issues that can be handled. Even if it really is the person you are talking to who has the problem, you handle it in an indirect way. Sometimes this can be better because that person talks more freely because she does not think you see it as her opinion.

c) Unidentified Objections

When handling unidentified objections take the stand of a helper. Help the person explore in a sincere way.

Client: "I just do not feel comfortable with this."

Salesperson: "May I review the points again because there may be a misunderstanding somewhere through my not being clear enough." or
"Is there a specific part of this proposal that makes you feel more uncomfortable than the others?"

Strategy 2: Don't Overreact

Salespeople often overreact when a customer gives them an objection especially if it sounds like an attack on the company, product, service or on the salesperson herself. Do not get defensive.

Remain calm, count to ten to let your emotions subside if necessary and if need be ask the client to expand on why they feel a certain way. This gives you more time to think and more information to work with. Also, quickly check your body language, facial expression and tone of voice. When you get intimidated, these signal sending mechanisms change without you realising it. These signals can sometimes be more damaging than the words.

Client: "This Hewlett Packard is a piece of garbage compared to the compatible IBM model."

Salesperson: "You obviously have a good reason for saying that. Maybe there are some things I can learn here today. What are some of the features that make the IBM model a much better one than ours."

Note: By saying this in a sincere way the client is disarmed. It is hard to push something that is not pushing back. It is verbal judo. Also when you hear the specifics, listen to them all before answering with your sales points. Also keep notes on what is being said. It is much easier to acknowledge and then present your features and benefits in a proper way.

Customer: "I dealt with your company when I was with XYZ and your after-sales service was the pits.

Salesperson: "You are obviously still upset with us. In what specific areas in after-sales service did we drop the ball?"

Customer: Customer expands on three things that happened.

Salesperson: "If I were you I would be feeling the same way about my company. AB Company and JK Company also had the same problem two years ago. They are now good customers of ours because here is what I do personally as their representative and the company also does four customer audits per year to ensure these things do not happen again."

Note: Instead of defending the salesperson clarifies and shows empathy. Also, the example of other clients with the same problem that are now customers, offers proof that things have changed.

Once again, not taking the objection personally is the key.

Strategy 3: Confirm The Objection

There are two main reasons why you need to confirm the objections where possible.

1. It lets the client know you have heard him. In other words you are concerned about his needs and concerns.
2. It helps you to be absolutely clear on what the objection is. The more clear the objection, the better the chance you have of solving the query. It is hard to hit a target if you do not know what it is and where it is.

When confirming an objection let the customer finish the objection. Then give verbal feedback to let the customer see and hear that you have heard the objection or that you want to be accurate on what you have heard.

- "You feel that the carpet will not stand up to the foot traffic in the lobby?"
- "Let me see if I have heard you correctly. You are saying that as an estate agent you need fast approvals on bonds for your clients and you do not believe our bank responds fast enough. Is that correct?"
- "So what you are saying is that this car is not good for city driving because it does not have fast enough pick-up?"

After making a statement like this you hesitate, so that the client can respond as to whether or not your feedback is accurate.

Strategy 4: Don't Argue

Arguments and conflicts do not sell a lot of services and products. The key to staying out of an argument with those who have a need to be right or show how clever they are, is to do a lot more listening than talking. It is especially good to validate the other person's point as worthwhile. Try and see the client's point of view from their side of the desk. In many cases the client may be right.

- "That is an excellent point and it is obvious we went to different schools of thought on this one. Another possible perspective to your point is..."
- "You are right, although there are a couple of other ways of doing this that are working well for ABC Company and XYZ Company."
- "XYZ customer said exactly the same thing until they saw the report that just came out on Unit Trusts that was done by the Financial Times. Ours rated first in the following six areas."

Note: It is good to acknowledge and respect the client's opinion and avoid putting the person down as uninformed or inexperienced. Valid facts and data do not mean you are disagreeing. It is a third party that is a credible source, disagreeing with the client or proving something different.

As a salesperson, gather as much outside resource material to back your point of view as possible. It keeps it impersonal and is not you against the client. You can say to the client: "I actually see it your way, but I have trouble arguing with the two top engineering houses in the country. They get paid big bucks for being unbiased with their opinions. They are also advisors to the Industry Association and the members would not put up with slanted reports."

Strategy 5: Handle At The Right Time

Timing can make the difference. There are times when you handle an objection immediately and it clears the way to complete the interview or presentation. There are other times you get bogged down on a small issue and cannot get to what makes the difference. Your presentation may cover the objection at a later point and to handle it immediately could also weaken the presentation.

a) Handling Objections Now!

Four or five minutes into a group presentation and the Managing Director or President says that your system is not compatible with the system they now have.

Salesperson: "Let me handle that question right now because if it does not fit I would be wasting your time continuing with my full presentation. XYZ Company thought the same. As you know they are a sister company to you people and our system is fitting like a glove with theirs. Let me give you their letter stating how well it works and the specs their programmer put together.

If you know your key decision makers will not listen unless a question or objection is handled immediately, it is wise if possible, to handle the objection immediately. Also if it is an objection that is quick and easy to handle then get it out of the way with the answer to the query. In a group presentation this method is really effective. It could save time. If you have included answers to common objections in your presentation it saves you time and energy.

- "Frank, I am going to cover that question in a few minutes along with several other points. Is it okay with you if I cover it then?"

If someone insists that you handle their questions and their body language indicates they have shut down, it may be wise to change tactic and acknowledge that you can see it is important to the person and you will handle it now.

- "Mary, I can see that your mind is still on that query you had. I am not comfortable moving on. That point is important to you. Lets stop for a minute and I will cover it for you."

Once again the word "**Awareness**" comes up. If you are truly aware of what is going on during your presentation or conversation with your clients, your timing becomes impeccable and you learn to trust your intuition.

Strategy 6: Respond With A Sales Point

Many questions or objections that clients or prospects have are disguised opportunities. Try and see how many objections and questions you get from clients that could have sales points added at the time you handle the objections.

- "I am really glad you brought that up. This system will not only record the time of the call but it gives the length and who it was from, and these are two features our competitors do not have."
- "Yes, the parts replacement on a car like this is expensive. The good news is that our new warranty covers all parts and labor for five years. In addition, you are guaranteed a loan car during the time your car is being serviced by us, including check-ups like the 15 000 km check up."

This method does not just neutralise a situation; it moves the situation to the positive side of the sales process ledger.

Strategy 7: Categorise And Handle

Most objections will fall under six different categories namely:

- 1) **Misunderstanding or Confusion**
- 2) **Skepticism**
- 3) **Hidden or False**
- 4) **Genuine**
- 5) **Lack of Interest**
- 6) **Lack of Sales Ability**

Through understanding each category and the standard ways of handling objections in that category you save time, energy and brain power. If you then combine the awareness of these "how to's" with continual practice, the format for handling most objections will instantaneously pop into your head.

Misunderstanding Or Confusion

This is when the client makes an objection or does not seem to be clear on what you are saying, showing or presenting. When letting the prospect know that you think there is a misunderstanding or confusion be sure to take responsibility for the client not being accurate.

High Risk - "Clients Fault"

"You are wrong. That is not what I said."

"I covered that. You obviously missed what I was saying."

Low Risk - "You Take Responsibility"

"It appears to me I did not put this point across in a clear way. I was actually saying there are no payments until June. Not no interest until June. There has been a misunderstanding.

"Somehow I steered you the wrong way. There is a misunderstanding. The point I was trying to make was that "this year's model has retained last year's features" not the model "has not improved." As a matter of fact there are two very important new additions."

Salespeople get very frustrated when they know they have what the client needs, but the clients cannot see it or they are misinformed and believe something else.

Demonstrating, showing proof and explaining facts can make a big difference if you once again take an "I am responsible" approach.

Client: "There is no way that I can get that kind of return on a safe investment in this country."

Salesperson: "I am sorry, I should have shown you exactly how we came up with the numbers and also how our insurance company has been granted a special license to divert a certain amount of investment funds to our off-shore money management company. The entire process is guaranteed by our company. Here is the guarantee and a list of our major investors. Most are well known companies. They would not risk it. Your money is safe with this plan."

Client: "Those seat covers will fade in hot sun. I had seat covers like this before."

Salesperson: "I did not explain this clearly. These covers look and feel like the ones you are talking about, but are not the same. This is a new fabric with a new dye method. It is the same material they use in non-fade awnings in the middle east. Let me show you the sun test results."

Under the Misunderstanding or Confusion objection you would find that it is;

- 1) Price; or
- 2) Does not believe the value is there.

1. Price

Most salespeople will say that price is always an issue. In this section we will be looking at two aspects of price, namely:

- Price too high
- Price is higher than it should be

Price is too high

This objection is when the prospect does not have enough money or budget to buy what you are selling or believes the price is higher than it should be or he is willing to pay.

Let's look at these two areas separately.

a) Price is too high - not enough money

This is where the person likes what you have got, but the objection is not enough money or it is not in the budget. Here are some options to handle this objection.

Once you have clarified that the client is interested, but does not have enough money, it is important to get the answer to two questions, if at all possible.

Question 1:

"When you say you do not have enough money in your budget, how close are we?" "What is the amount that you are short?"

Note: It is important to establish that amount.

Question 2:

"If you had the money or could find the money, would you purchase the program?"

This second question clarifies whether or not this is the real reason for not buying. You could actually close on this objection. The close would go something like this:

"If I can show you where to access the money without upsetting other areas you are handling, would you take the program?"

Now that you have established the amount we are short on and the willingness to buy, you can use a few of these options.

- "We can let you pay us over two budget years."
- "If you give us a deposit of 40 000 we will take 12 months of payments at 3 000 per month."
- "Do you have a supplier who would sponsor part of the costs as a good will gesture or see it as good advertising?"
- "Is there another budget we could dip into? For example what would give you more results, 25 000 in advertising or 25 000 invested so that your people could go through this sales training program?"
- "We could allow you to buy it in chunks. You do not have to buy it all at once."
- "Lets look at where we could trim but still deliver the core of what you need."
- "We actually have another program that fits your price range and still does the job. This was the Rolls-Royce package."
- "We have a bank that carries our paper. They could give you financing over three years."

- “Is there a chance you could present the concept to the board and let them decide whether or not it may make sense to change the budget because of the immediate results you will see? It is always wise to spend money if it will make you money.”

b) Price is too high - higher than it should be

There are two main questions you need answered before proceeding:

Question:

“Mr. Client when you say the price is too high, how high too high or how much too much do you mean?”

When the client answers this question you know what amount you have to deal with. The important thing here is to separate that amount from the total amount. By the client telling you the amount, you know what he is happy to pay, so you do not sell him on that amount, he is already sold on it. Focus on the difference. For Example:

Client: “I am sorry, but the purchase price of that house is too much.”

Salesperson: “When you say too much. How much too much?”

Client: “About 20 000 too much.”

Salesperson: “So what you are saying 280 000 is okay with you. It is the 20 that is holding you back.”

Client: “Yes.”

Salesperson: “Well, let’s take a look at what you get for that extra 20 000 or 250 per month in payments.”

For an extra 250 per month you are:

- Just across the street from the elementary school and you said you wanted to be close to the school;
- The area you were looking in is 10 kilometers further away from your office. You save yourself 20 kilometers of travel per day and in gasoline and wear and tear on your car it translates into 5.00 per day, which is over 100 per month. That is almost ½ of the 250 per month.
- The house has a view and you really feel a view gives you a sense of freedom.
- You have a two car garage that is very secure.
- Your wife is in love with it.

So what we are saying is, deduct the gasoline savings or spend an extra 150 per month.

- You reduce your worry about your children walking to school.
- You save time not having to drive or walk the kids to school.
- You are closer to the office and save time again.
- You end up with a view you want.
- Both cars are securely locked up.
- Last but not least, you have a delighted wife.

For a 150 a month would you not agree that it looks pretty attractive as a buy.

Note: I did not say for an extra 20 000 or for 300 000 which is the total price. The focus was on the difference and the lowest amount. You could also say, “For an extra 5.00 per day, would you not say it is worth it.”

Question:

“When you say that the price of those tools is too high, too high compared to what or to whom?”

With this question you clarify what your product or service is being compared to. In the case of the house being bought in Question 1, the client might have said compared to the one 10 kilometers further away from the office. Then the estate agent could make a comparison and it would be easier to justify the extra amount.

In the case of the tools being sold, they could be compared to another brand of tools that are not exactly the same, or with a competitor carrying the same tools. For Example:

Salesperson: “When you say the price of the tools is too high, compared to what or whom?”

Client: “Compared to Northlands Accurate Tools.”

Salesperson: “Are we talking the exact same tool set?”

Client: “Yes, they are made by Dover out of England and they have got 36 tools.”

Salesperson: “Sounds like the same set.”

Client: “It is.”

Salesperson: “When you say too high compared to Northlands, how high too high?”

Client: “100 dollars.”

Salesperson: “Let’s take a look at that 100 dollars. You get extra value far beyond the 100. Here is what you receive:

- Insurance on the tools and an extra two year warrantee.
- If you ever have a problem we keep a loan set.
- We have a full time support person who also comes out and conducts two workshops for your mechanics on how to use the tools.
- We have a 24 hour help line.
- Plus we can give them to you today; you have an account with us.
- And last but not least you get me as your sales representative and as you know I will see that all our promises are delivered.



- All of these are the reasons why it is worth buying from us. I will also keep this in mind and on another purchase where we have got the margins I will see that we even the score.”

2. Doesn't see the value for money

This is a little different than the price it too high. The client is saying he cannot see how the value is there.

This can be handled in numerous ways, namely:

Clarify what the client sees as value

This is where you bring in opinions on value from people who are well respected by the client. Their endorsement could get the client to re-frame his idea of what value is.

Client: “I cannot see how it would be worth that much money.”

Salesperson: “What specifics would you see as important for you to invest this much?”

Note: Once again you are clarifying so you can build up some value against the client's criteria. In the selling of many services and products you can make changes that will fill the clients picture of value.

Stack the pancakes

This is where you get the client to identify the pros and cons of buying. The object is to stack the pros much higher than the cons. In the module on closing, this is called the “balance sheet” close.

In this case the objection is true. It cannot be eliminated. The key to handling this type is to build up the other side of the balance sheet so that the pro's far out weigh the cons.

Customer: “The rates at your hotel are much higher than the Hilton down the street.”

Salesperson: “That is absolutely correct. I cannot deny that. However let's look at the seven savers that balance that out. I will illustrate it:

DEBIT SIDE	CREDIT SIDE
Higher Rates	Free Ride to and from the Airport
	Free bath robe
	No tipping - we pay well
	Stay 7 get one free “club”
	No parking costs

Try and Buy

This is where the person or company tests samples or uses the product or service for a certain period of time. It could be the use of a copier for two weeks, lying on a bed for three minutes or a day of free consultation. The purpose is to prove the value.

Skepticism

Skepticism is when the client is questioning you because of lack of trust in you, your product/service, your company, your industry or salespeople in general.

Under skepticism there are a few categories that these objections fit.

1. Previously burnt

Someone who seems to be extra cautious, untrusting or makes you go far beyond normal procedures to sell to them may have previously been burnt by your company, another representative from your company or by the competition. It could also mean that someone they know was previously burnt. It takes sensitivity and awareness to accurately detect the verbal and non-verbal cues.

The best way to handle someone who you think has been previously burnt is to:

1. Let them know you have a feeling they have been previously burnt;
- b) Validate why they should feel cautious because you would too;
- c) With permission, show and explain why you are different;
- d) Offer proof.

Salesperson: “By the questions you are asking, I have a feeling you or someone close to you has had a bad experience with an estate agent listing your home.”

Client: “You are right about that.”

Salesperson: “Can you tell me what happened?”

Client: “Six months ago a fast talking woman from “Top of the Market” Real Estate Company came in here and told us we could get 500 000 for our home, promised to run several open houses and run ads in the week-end newspapers. Our house was over priced, it did not sell and she held one open house and ran two ads. We put up with this disruption for three months. How do I know you won't do that?”

Salesperson: “First off, if I were you, I would not trust another estate agent. Real Estate Agents that do those kinds of things give our industry a bad name and actually stop people from listing their homes with an agent. I am going to apologise on behalf of our industry. With your permission I would like to show you the actual contract I will sign with you including a flow chart of activities that I commit to in order to sell your home. I commit these things to both you and our company. If any of this is changed without your permission, you have the right to a new agent from our office or the right to cancel.

I am also going to give you the names and phone numbers of the last couples who have listed their homes with me. Six are sold and the other four have been listed with me. I would like you to contact them so you can feel secure in dealing with me. It is my policy to go the extra mile especially if someone has had a bad experience with someone in our industry.

2. Dislikes salespeople

The Analytical and Supporter type quite naturally feels uncomfortable with, or dislike the "stereo type" salesperson. (Outward, super positive, personality plus.) It even goes further than that with a few. If you have got a business card that says salesperson or you are introduced as a salesperson you are in trouble. This could also apply to people not liking, or trusting certain professions e.g. Real Estate Agents, Lawyer, Contractors, etc.

There are a few different things that can be done and they are all tied to you changing their impression of you and not seeing you as a typical salesperson, lawyer, accountant, contractor, etc.

Here are a few ways to do this:

- a) **Find a common denominator** e.g. Your son is going to the same school as her daughter. She may now see you as the father of a student who goes to the same school as her daughter. We now have two parents of teenagers talking.
You both belong to the same golf club or have a cabin on the same lake. This is when doing advanced information gathering pays off.
- b) **Relate to the profession** you were in before becoming a salesperson. For example, engineers generally do not feel that great about salespeople. If your previous career was an engineer and the client finds this out he may not see you as a salesperson. He may see you as an engineer calling on him and having a discussion. Another way may be that your father or brother is an engineer and you relate what you know about engineering through the influence these people had on you. This display of respect can change their perception.
- c) **Change your physical appearance.** Instead of calling on a farmer in a suit you put on a jacket, casual pants and shirt. You are now not seen as a typical salesperson. Looking more like a service person or support staff can be more effective with some people. Even driving a jeep or a 4x4 truck could make a difference.
- d) **Bring someone with you.** If you are selling to an Information Technology expert you may bring along your company's IT person. It enhances your credibility.
- e) If you are selling a training package and you bring along a Human Resources person who was involved in the design of the program, you will dilute the negative impression the HR person might have of you as a salesperson. It lends credibility.

3. Needs proof

This is where the client is not convinced about something you have said or presented and needs to be shown proof through research, endorsements, demonstrations or actual use of the product or service.

Client: "How can I be sure that my deposit won't get spent and you then cannot deliver and I lose out?"

Salesperson: "Here is the contract and you will see right here where your cheque goes into trust until the project is complete."

Client: "How do I know that these boxes will protect the furniture when shipping across the country?"

Salesperson: "We will come in here tomorrow, box up four pieces of furniture you are shipping and let you see how protective the boxes are."

Client: "I don't believe that I can get 35 kilometers to the liter with this car."

Salesperson: "Here is the consumer report on how the car rates on gasoline mileage in the city and on the highway at sea level. It actually says 36 kilometers to the liter."

Client: "There is no way I can believe that you people can guarantee delivery in two weeks."

Salesperson: "Here is John Jackson's phone number at Xerox. Ask him. We recently delivered to him in 10 days."

Two common ways to handle skepticism are;

- i. **Third Party:** This is where someone with the expertise, credibility or power gets involved to help with the concerns of the client.
- ii. **Similar Situations:** With using the similar situation approach you are actually indirectly utilising a third party. E.g. "Mr. Client, I can see what you are saying. Yesterday we had a similar situation occur with XYZ Company and here is what we did for them to solve that problem."

Hidden or False

This is where the client is giving you an objection, but it really is not the reason he/she is not buying or moving forward.

The client may be knowingly or unknowingly giving you a false objection. There are also times when you receive an objection and it is really the outer layer of the onion. The objection that is actually stopping the process is buried several layers down. It is hidden.

The most common reasons that a client consciously or subconsciously uses the hidden or false objection are:

1. Don't want to outwardly say they cannot afford it (price).
2. They don't think the value is there. Again it is price, because they don't see that they will get the value for the money spent.

Note: How to handle the "price is too high," and "don't believe the value is there" are covered under the first objection - "Misunderstanding or Confusion."

1. They may not like you, the salesperson, someone in your company, or something about your product/service that may bother you if you were told. So what happens is the client will use an objection that is not real, hoping you will accept the objection, resulting in the client not looking bad or ending up in an uncomfortable position.

If you sense something like this, you may use something similar to this statement;

- "Mr. Jones, I believe with all my heart that this system is the answer to your problems and a few times in the past I have had situations with clients where the real reason they were not buying was that they did not feel comfortable with me. I would be glad to set up another representative to handle your account. I know that sometimes people don't feel comfortable with my style of doing business and I am okay with a switch if you would feel more comfortable. I would like to see you dealing with our company on this project."

Another statement may be:

- "If it is your budget that is stopping you, we could bill you 50% in this financial year and 50% in the next financial year."

On pages 6 and 7 of this text (a) excuses, (b) smokescreens and (c) unidentified objections were described along with an example of how to handle them. These are hidden or false objections.

Genuine

A genuine objection is where the client has an objection that is genuinely real. It could be;

- What is being presented is beyond their budget.
- Your system is not compatible with theirs.
- Not sure that the new system could be functional quickly enough (especially if this is real).
- Your price is higher than the competition.

A few ways to handle genuine objections are;

- Offer something additional to compensate for the situation.
- Problem solve - for example the system may not be able to be in effect quick enough and you offer to help them "job the work out" until the system is in.
- Acknowledge the objection is real and then build up the other areas that are a plus. If you can build the plus side high enough the genuine objection may not be big enough to stop the process.

Lack of Interest

This is when the prospect is happy about her present situation and does not see a need for your product or service at this time. It also may be when the prospect has apathy about her personal life or about the business or industry. Motivation may be low. The person may also be quite closed about what interests her. In handling this type of situation it is good to acknowledge that you can see the situation and then proceed in a courteous manner to show a wide variety of your services, products, features, benefits, uses etc. The key is to watch the client's reaction in body language and questions. What you are actually trying to do is "light a spark" on something so you can get a focus. An example of this would be a potential client saying that he is happy with his staff's level of competence and does not need to train his people. My answer may be:

"Let me just take a minute and review a few things that we do in reference to training and leave some "how to" tips in case you can use them."

Then I would proceed to give 10 key points on the absolute best way for company phones to be answered, 7 key service strategies, 20 points on increasing sales, 12 ways to make advertising really work, etc. Most of the time clients will get interested in certain points and begin to see some possibilities.

Another approach may be to tell a story or two of what other people have done with your product or service. Present a variety of things that are not normally presented or that are presented in a unique way.

Lack of Sales Ability

If the reason for the client not buying is that you were not skilled enough in preparation, closing, handling objections, developing rapport, etc. then the objection would be described as lack of sales ability.

Let's look at several types of situations that occur that can make us miss a sale through lack of sales ability. Each situation has the "how to's" of handling those situations.

1. Likes to be in charge

The Controller type person falls into this category really easily. This person does not like to have someone trying to control her. If she feels you are trying to do this, she may refuse to buy, or make the sale very difficult for you.

The most effective way to handle this person is a three step process

Step 1

Let the person know that you respect their wisdom, power and position.

- “Mrs. Baxter, a person in your position with your experience and knowledge does not need to be sold. You know what is best.”

Step 2

Give options and alternatives

- “Here are a couple of options that you may want to pick from.”

Step 3

Ask for the client’s opinion or choice

- “Which one do you like or do you see another option?”

By knowing the relationship styles you will know when you are dealing with the Controller in them. If you are a Controller type and you are face to face with a client of a similar nature you will notice a bit of a power play that automatically starts to happen between the two of you. Remember, you could win the battle but lose the war. It is better to show your maturity and wisdom by shifting to options and probabilities for the client to see and work with. Indirectly you are in control of the situation by not trying to take control through dominance.

2. Can’t make a decision easily

The Analytical fits here because of the tendency to procrastinate on decisions. The Supporter also fits here because of a tendency to be unsure or has a need to know they are not at risk.

The method of weighing up the pros and cons works quite well, especially if it is done visually.

Consumer reports, surveys and endorsements can also help this along.

Thoroughness and moving at a slow pace covering facts, details with the focus on low risk, security and guarantees can make a big difference in moving these people to a decision.

Be patient and respectful. Take a nurturing, caring approach.

3. Left out of the sales process

We have all experienced the telemarketer or face to face salesperson who seems to be working from a memorised or canned presentation and continues on like a robot no matter what you say or how you react. This is when you feel left out of the sales process. It is often a reason why people do not buy, which can be considered an objection.

For most salespeople (excluding the canned or memorised sales pitch) this can happen when you do not feel connected to the client and you are not getting a response. At this point you become self-conscious and begin to just roll through what you have got to say. Very quickly the client feels “talked at” instead of “spoken with.”

When you see or hear yourself doing this, you can use a couple of these options:

a) Be Straight and Direct

“Mr. Botha, I am afraid I have just been making this a one way conversation and I am sure you have felt left out. It is obvious I need to know more about you and your company and your needs to see if we have anything to offer. What are the challenges you are finding with expediting to 150 drivers?”

Note: In the example, the salesperson was honest about what was happening then tried to get a two way conversation going.

b) Make it More Experiential

This is where you hand the product to the client. Let them touch, smell, taste, listen to and look at it, if it is appropriate. This changes the “state” of mind. Then you ask for feedback on specifics.

In the case of a car the salesperson may say, “here are the keys, hop behind the wheel and let’s take the car for a spin.” Recognising that he was talking too much, the salesperson would then change his style to a less talkative person and ask only a few questions, and listen. This could also be done with a written presentation by flipping to a certain page and asking for feedback or drawing a diagram on a whiteboard and getting feedback. The purpose is to reverse the flow to a two way conversation. “Talking or speaking with” instead of “talking to.”

c) Change Your Voice Tone

In many cases salespeople forget to be aware of what they are saying and how they are saying it. Some people talk to people that are one meter away as if they are six meters away or they are talking as if they are speaking to everyone in the office when it is one person.

Stop presenting and drop your voice tone back and change the inflection in your voice on different words. Get rid of the “let me put you to sleep” monotone voice.

This can bring a client back into the process.

4. Feels pushed

Certain types of people do not like to feel pressured or pushed by salespeople. Both the analyticals and supporters will quickly pull away physically or mentally if they feel pushed.

Awareness is the key once again. All of a sudden if you notice the climate change in the conversation and the other person or person(s) seem to lose interest or back off, there is a good chance you may have become too aggressive.

A couple of methods that can reverse the situation and/or dilute the problems are:

a) Switch to becoming the listener

- “You know I have not shut up. I have been doing all the talking. I would be interested to know what you decide to look at our system in the first place.”

b) Apologise for your energy and excitement and/or your aggressiveness

- “I have got a feeling I got too excited and have been pressuring you. Please accept my apologies. You obviously want to take your time on this decision. What information can I give you that will help you make a decision on your own without me?”

c) Back Off

- “I think I have over done it with how great this house is. Why don't the two of you take your time and wonder through the house on your own. I will be out front making a few calls on my cellular phone if you need me.”

One way of overcoming lack of sales ability is to get someone with the ability to help. In other words utilise a third party.

Other Techniques that Work

1. Straight on Technique

This method is not used very often but it is sometimes wise to use it when dealing with statements made by a client that are incorrect and very derogatory to your company, product, service or yourself.

Client: “I do not know if I want to deal with a company that does not pay its suppliers.”

Salesperson: “That is not the kind of statement I can easily accept. I do not know why someone has misinformed you or is maliciously trying to damage our name. I take offence to the statement and want to clear this up. What made you say this?”

Note: This straight on technique and strong stance will generally either get to the bottom of the objection or eliminate the objection.

The only caution is, you had better be sure you are well informed or at least make the statement “based on your information, although there may be something you have not been told about.”

2. Agreeable Technique

This is where you agree with the client and then move on to your view or a sales point.

- “I agree with you, although there is another way to look at this.”
- “I agree with what you say about the industry, however our company is different, that is why we are the leaders.”

The agreeing validates the client's opinion or point. This creates a climate for the client to listen to what you want to say. Try to use, “although, or however, or there is another view point” instead of “I agree, but...”

3. Questioning Technique

This is where you turn the client's objection into a question.

Client: “200 to winterise those bedroom windows is a lot of money.”

Salesperson: “Don't you feel an extra 200 would be worth the guarantee that you will have a warm winter this coming year?”

Note: This approach to handling an objection puts the ball in the client's park. This gets the client to either start justifying the investment or describing why he does not see the value. Either way it gets things out into the open so you can aim at appropriate targets.

Sayings that Help

A few more statements or sayings that you may be able to adapt are:

- “Perhaps I do not understand exactly what you have in mind. Would you mind laying out the process you people use.”
- “Possibly I can serve you better if you could give me more information on what you expect from a new telephone system.”

Most Important Process

The most important process in objection handling is the process we showed you in the beginning. It is to get together with business associates, team members and even clients and do a brainstorm of every objection or question a client has had, or possibly could have in the future. Then you take each objection; decide on optional strategies for handling it by reviewing the 7 Winning Objection Handling Strategies, and by categorising the objections or questions. Literally write out four or five different ways to handle each objection. Put the list in your office, home, car and daily planner so you can study it to the point that all of them become part of your subconscious. With this method you will find that objections create sales rather than prevent them. Remember **objections are only unanswered questions.**



Exercise 1:

List the top 5 Products or Services that you are most often told that the price is too high. Then assume you've said, "How high is too high" or "compared to who or what." Then that person tells you how high too high or what he / she is comparing it to. Next to the product or service below list the additional value they get by buying from you.

Product / Service	Added Value That Justifies The Difference
1.	
2.	
3.	
4.	
5.	

Exercise 2:

This exercise will take you several weeks to complete. We will do it in stages.

Week 1:

Objections, concerns, questions and hurdles are not always about the products or service you sell or about the price. Objections can be perceptions that people have about your industry, your profession, about you personally, and about the company you represent. With all of these in mind Brainstorm all the possible objections, concerns, scenarios etc. that you've encountered in the past, are encountering now or could encounter in the future. Do this immediately and then over the next week add to that list and combine some of them where appropriate.

Week2:

Prioritise them with number one being either the most common or most relevant one at this time for you to focus on. Then prioritise the balance of them. Select the top 5 and develop as many ways as possible to handle those objections.

Week 3:

Take the next 10 and list all the ways to handle those objections.

Week 4:

Take the balance of the objections and do the same.

Week 5:

Put all the objections and the solutions on a list. Put it on your computer, put it on the wall, and put it in your diary.

Week 6:

Commit yourself to review 5 Objections per week and how to handle them. Continually add improvements to the responses and solutions as well as new objections that come up. Continue the 5 a week process for 3 months and you will find objection handling becomes second nature to you.

After the 3 months do one a week to keep yourself finely tuned to objection handling.

Summary

By studying this module and doing the exercises you will have:

1. Put the Objection Handling Process to work on real world objections and concerns.
2. Learned the 7 Objection Handling Strategies and how to categorise various objections.
3. Developed Specific Objection Handling Strategies for specific objections and concerns.

Suggestion: Continually review this module so that you internalise the Objection Handling Language.



Module 9

Closing The Sale

Learning And Sales Development Outcomes

In this module you will:

1. Learn to Close The Sale More Effectively.
2. Receive several processes to maximise your Customer Contact through Up Selling, Add-on Selling, Clipboard Selling and a number of other Sales Increasing Skills.
3. Complete valuable exercises on Closing and Maximising Additional Sales Opportunities.

*Ntsika Enterprise Promotion Agency,
with a focus of rendering non-financial support to SMME's
is part of The Department of Trade and Industry in South Africa.
Ntsika, along with the support of The European Union
assisted in the Initial Development of the
Boosting Sales & Profits With Focus Selling program
in conjunction with Knowledge Brokers International Limited.*

Module 9

Closing The Sale

The scene is an office at the V&A Waterfront in Cape Town, S.A. I'm sitting in the office of Gideon du Plessis one of the top Financial Advisers in S.A.

A few weeks before I did a 3 hour presentation to Gideon and his two sons on the ABC's of targeting and Retaining, Developing and Regaining and Gaining Clients. At the end of my presentation Gideon said to me that he wanted an hour of my time in a few weeks to talk about my financial needs. He also said he believed that I probably was like most business owners .." so busy working in my business and looking after others that I probably haven't properly planned for my future". He said his P.A. would call for an appointment two weeks from now. I agreed.

Knowing that Gideon was a top producer I brought Marius Liebenberg our CEO and Financial Director to the meeting. I felt he could protect me from committing too quickly. We all know the easiest person to sell is a salesperson!

So there we were sitting across from Gideon and talking about our company Knowledge Brokers International and how we were doing, some background on me and what I had in place financially and what I didn't have in place.

The final moments of the conversation went something like this:

Gideon	Bill and Marius, how much is your monthly payroll at KBI?
Marius	About R400,000 per month.
Gideon	Would 5% added to or taken away from that amount effect the business.
Bill	Not really! If it does we probably shouldn't be in business.
Gideon	5% of R400,000 works out to R20,000 per month. Guys that is what we should start putting away into an annuity for Bill.
Marius	Maybe we should think about it! We are not sure which bank account it should come out of and we need to talk to an International Tax Expert.
Gideon	Bill, have you ever been in this situation before where you were about to put money aside for your retirement and your well-meaning partners and advisers suggested delaying the decision for more discussion?
Bill	Yes, it has happened.
Gideon	That is probably why you haven't put more aside.
Bill	You are right!
Gideon	It is not going to happen this time. You work hard for your money and you look after your sons, your partners, your employees, your wife and everyone else and like most business owners don't take the time to look after you.
Bill	I'd have to agree.
Gideon	Marius, I appreciate the role you play here.
Marius	Yes, I want Bill to make the right decision.
Gideon	So do !! My job here today is to make sure that Bill does not leave this room today without you guys committing R20,000 per month to his future and I'm going to see that is done. In all due respect to you Marius I see that your job is to figure out which bank account that money will come from. Is that fair enough?
Bill and Marius	(Looking at each other) I guess so.
Gideon	Okay, let me get the details from you.

Bingo! He wrote me up for R20,000 per month.

Gideon, utilised a combination of what we call the Direct Close, The Assumed Close and because of his credibility with us ... The Consultant Close.

Yes, we definitely need to target the right clients with the right frequency, build rapport, advance the relationship stages, understand the clients needs and handle questions and concerns but there are times that we need to "nudge" that process forward into a completed transaction by Closing The Sale. Top producers and Successful Entrepreneurs know how to do that!

Gideon knew the timing was right and that he had to take charge in a strong but polite way. He did that.

Not everyone is a Gideon du Plessis. There are lots of quiet, unassuming salespeople that are top producers who are extremely effective at closing the sale and maximising up sell and add-on opportunities. The first part of this module will help you with closing the sale and the second half will be on maximising the customer contact opportunities.

Let's now move to looking at "buying signals" and the 17 Ways You Can Close The Sale.

Closing The Sale Is Easy

Providing you have established a trustworthy relationship with the customer at the beginning, and given real assistance throughout the sales interaction, closing the sale is easy.

To close the sale, a salesperson must have two major skills:

- The ability to recognise a buying signal and
- The skill to use the right closing method

In this Module we will cover both of these.

Buying Signals

Quite often, the prospect will ask you a question or make a remark that indicates an unusually favourable reaction. So favourable in fact, that it actually shows that the prospect is now ready to buy, even if he may not say so in so many words.

The client's question or comment is in effect a buying signal, which tells the alert salesperson that he/she is ready to buy. One buying signal could be an admission of their need for what you are selling. Another may be evidence that, in their mind, the decision to buy has been made. Again, another statement may indicate that the customer is thinking beyond the purchase and is considering some points that would come up only after the purchase is made.

Following are some verbal buying signals

- "I guess I really should be buying some insurance with the new changes in my life."
- "It does make sense that we buy from a local software supplier."
- "Yes, I would agree, I should have a car that can easily hold my entire family comfortably."
- Being close to the school really does make the difference when deciding between these two homes."
- "One bank handling all my business definitely makes good business sense."
- "I agree, a dark navy blue suit gives me more power."
- "You know, I like that financial investment plan the best."
- "Those bricks are sturdier and have the style we need to have in this new hospital."
- "It would definitely have to be a black car, that is the colour my husband likes."
- "This is no doubt, the best house for us."
- "It is the five year mortgage bond that I want."
- "The beige sofa is the one that fits the decor in our living room. I do not want the other colours."
- "The lap top with all the bells and whistles is the one I need."
- "Am I going to be able to increase the amount of this insurance in a few months if I want to?"
- "My sister is going to be shocked when I drive up in this new BMW."
- "I can see this room done in pink. It will be beautiful."
- "When I come back a year from now I will expect the same kind of attention."
- "Halfway through the project I may want to switch the colour of the bricks."
- "My husband is probably going to be shocked when he sees me with this expensive new outfit."
- "Suppose my husband does not like the car when I get home, can I bring it back?"
- "When I call you in two years am I going to be able to upgrade this networking system fairly easily?"
- "I see myself paying this loan off in six months, not twelve."
- "Do you deliver to the Southside?"
- "The price is really in line."
- "Can I get cash out of this savings instrument if I really need it?"

Following Are Some Non-Verbal Buying Signals

- The client goes back to the product several times.
- The client keeps going back through a proposal especially to certain pages.
- There are physical gestures of agreeing during the presentation.

When To Close

Remember, you could be dealing with a brand new client who is at the maximum visible development point of the buying cycle and they could make a decision to buy with very little relationship building. Following are some examples of good times to close.

- When a customer gives you a buying signal, either verbally or non-verbally
- After you have had their agreement on several features and benefits.
- After you have restated the benefits at the end of a presentation.

How To Close

Following are 17 different ways to close the sale. The key is to use the right ones at the right time. By memorising them, you will subconsciously put the right one into gear at the right time. Remember, these are not invented techniques. They are procedures automatically used by some people to bring an issue to

a closure. All that has happened is that labels or names are put on them so they become teachable. Another important point is to be **aware** of how you have closed, exactly what you said, what the situation was, your actual physical gestures, etc. in the past and what you are doing in the present. Through observing yourself, you become aware of what works best in a specific situation. This way you can repeat it in a similar situation. In other words, you can consciously create your success because you consciously know what works.

Take your time reading these closures. After each one contemplate when you have used that specific one. At the end of the reading you will realise you use certain ones more than others.

1. The Alternative Close

This is where you give options and alternatives. It is a soft way to close because you are not directly asking the customer to buy. It could be a decision on size, colour, type of material, a certain design or some feature of the product or service.

- “Do you want the corrugated or the non-corrugated?”
- “Do you want the envelopes that have padding or the ones without padding?”
- “Which car do you want, the one with the bucket seats, or the one with the bench seats?”
- “Is it the policy for 250 000 that you want or do you want to go for the 500 000?”

2. Assumed Close

The **assumed close** is exactly that. You simply assume that the prospect has made up his mind to buy and act as if you naturally expect the order. It should be done quietly and confidently. Start writing up the order or wrapping the merchandise. Take “if” out of your conversation.

- “This saw is going to save you a lot of time.” (as you start to take it to the cash register.)
- “I will have this on the air for you tomorrow.”
- “I will set an appointment for a medical next week.”
- “The car can be ready by 4:30pm this afternoon.”
- “We can install the software on your system right now.”
- “I can have our office put an advertisement together to have your home advertised in the newspaper for this Saturday.”
- “To get started immediately, I will need your signature and a deposit cheque.”

3. Minor Decision Close

This is where you move the sale forward to a close on a minor decision rather than a major decision.

- “Which day of the month would be convenient for the money to be automatically debited from your account?”
- “Do you want weekly deliveries?”
- “Which neck tie do you want with this new suit?”
- “Do you want your house listed in Real Estate Today or The Local Daily?”
- “Would delivery at 2 o’clock suit you?”
- Is it that corner you would like it in?
- Who do we need to train as an operator of the equipment?
- “Do you want the car with the see through floor mats or the grey leather ones?”

4. The Courtesy Close –“ Silent Principle”

The courtesy close uses the principle of the silent close. This is where you actually show courtesy towards the buyer or buyers by volunteering to leave them by themselves for twenty minutes or half an hour to discuss a few more issues before giving you their decision.

The courtesy close works extremely well when more than one person is in on the decision and just at the last minute one of them begin to “hitch” or “resist”. The person may be arguing or showing unhappiness about this immediate decision but will not totally be forthright with you in the room. The following statements would be appropriate:

- “It sounds to me like you two have a few more things to discuss. It is not fair that you have to discuss it in front of me. Why don’t I just go for a coffee, you two can sort things out and in fifteen minutes I will come back and you can give me your decision.”

Some salespeople believe they will lose the business if they leave them alone. My experience shows me that 90% of the time it is a yes. They appreciate the time and privacy to discuss the issue and no one’s ego is on the line by having an audience. It also sets a time limit. E.g. fifteen minutes for them to decide. That rolls it forward to closure.

5. The Direct Close

The direct approach is often used with people you know well or with the more direct types like the controller type or promoter type. Most of us, as salespeople, have used a version of the direct close. Examples are;

- “John, I have been out to see you six times. We have covered every concern you have. Why don’t you get your cheque book out and give me the cheque for the first payment and the automatic debit and I will get out of your hair.”

- “Sooner or later you are going to have to implement a plan like this. Why not say yes right now and we can get started.”
- “Can we go ahead?”
- “Shall I arrange delivery?”
- “Can we sign the paperwork now?”

I use a version of the direct close after it is obvious the client wants to do business but says to me “Bill, put a proposal together and get back to me.” The close goes something like this. “Vincent, I could go back and put a proposal together and delay this whole thing another week or your could give me the go ahead on what we have discussed and I will give you a confirmation letter outlining the details. Then I can get started immediately and we will see the results you are looking for a whole lot faster.”

6. The Puppy Dog Close

The puppy dog close is where you actually let the client try it, test it, use it and sample it before they buy!

It is called the “puppy dog close” because of how puppy dogs are often sold.

The puppy dog owner says to a friend, “Take this little puppy dog home. Let your children play with him for the weekend and then you can bring the puppy dog back on Monday. You are not under any obligations to buy.”

Once the children play with and learn to love the dog for three days it is going to be close to impossible for the father to get the puppy dog away from the children to return to the owner, hence this is the Puppy Dog Close.

Certain brands of photocopiers are sold this way. The salesperson says:

“Let me put a new copier in your office for three weeks. Let your staff try it. You are not under any obligation to buy.” Just like the small children with the puppy dog, the staff are not going to want to give up the new copier, especially because it works better than the old one.

As a speaker I often use the puppy dog close. I will say something like this to an executive of a company:

- “If you would like me to, I would be glad to come to one of your senior management weekly meetings and speak at no charge so you can actually experience my style and get a first hand view of the type of content I deliver. This will save both of us a lot of time. You and your team will know whether or not you want to utilise my service.”

What I am really doing is giving them a “test drive” of what I can do.

- A car salesperson could actually loan a long term customer a car for the week-end to try it out. Be sure your insurance covers this. A “test drive” is also a form of puppy dog closing.
- A puppy dog close may also be when you say, “Pay me for it, take it and within a month you can bring it back and get a refund if you are not happy.”
- A puppy dog close in real estate may be: “Let me list your house for two months, if you are not happy with the effort and results you can give the listing to someone else.”
- One packaging salesperson uses the following puppy dog close to sell with, if the client does not believe the padded envelope will protect his goods.

The packaging salesperson says, “I am going to take one of your items and post it through our mail system to you. When it arrives, check how well protected it was.”

- In banking a banker could say, “Let me come in and analyse your situation and give you recommendations on the best way to finance this new project. You are under no obligation!”

7. The Urgency Close

The “Urgency Close” is when the salesperson presents a situation, a scenario, facts, factors or benefits to the client that motivates the client to put some urgency into the decision to buy. It is most effective when you are telling the truth. Some examples are:

- “We only have four days available in the next 45 days that we could install a system and that is in two weeks. If you are seriously thinking of getting the system in by month end you might want to let us know as soon as possible.”
- “This is the only black one with gold trim left in the city and as you know they are very popular. I would really be unhappy to see you lose out on getting exactly what you wanted. I would suggest you make the decision as soon as possible. It is the last one.”
- “Interest rates are going up on Monday, according to the Financial Times. If you are going to need a mortgage (bond) you would save by buying today.”

The close that is sometimes called a “Bonus Close” fits comfortably under the Urgency Close category. Examples are:

- “If you buy today I can give you twelve months free interest on the financing.”
- “I can’t drop any lower on the price, but if you make the decision to order from us today we will pick up the shipping charges.”

8. The “Shut Up” Principle Close

If you have been in sales for any length of time you have heard the saying, “once you ask for the order you shut up!”

The point being made is to allow the other person time to think after you have asked for the business. Being silent puts the responsibility of a response with the other person. Thirty seconds of silence can also



feel like three minutes, so it does create some urgency, and if the whole process has been clearly moving towards closure the silence speeds it up.

As an exercise to prove this point just ask a spouse, child, or team member for a response decision on a topic that fits that relationship and then remain silent instead of continually making a point. Watch what happens!

Examples would be:

“Can I come and see you on Monday?” ... Silence

“Are you going to take it?” ... Silence

“Can we get started on Monday? ... Silence

“This is the package I’d recommend ... I could deliver on Tuesday!” ... Silence

The “Shut-up” Principle can be combined with many of the other closes.

Examples:

“Which one do you want ... the blue or yellow one?” ... Silence ... with the Alternative Close.

“Who do you want the free subscription to Fortune Magazine that goes with the computer to go to, your son?” ... Silence ... with the Minor Decision Close.

“It is the last one in stock. Take it!” ... Silence ... and the Urgency Close.

9. The Bonus Close

This is where you can utilise an incidental (Bonus) if they buy right away (Urgency) or if they buy in a certain way. (Volume etc.)

The close that is sometimes called a “Bonus Close” fits comfortably under the Urgency Close as well.

Examples:

- “If you buy today, I can give you 12 months free interest on the financing.”
- “I can’t drop any lower on the price, but if you make the decision to order from us today we will pick up the shipping charges.”
- “If you take both plans we will knock 20% off the price.”

10. The Objection Close

This is where you ask the customer if she would agree to buy if you erase her objection.

Examples:

- Customer: “That tent would hold up to mountain weather.”
Salesperson: “If I show you that all the testing was done in the extreme conditions of the mountain, would you take it?”
Customer: “Yes”
- Client: “There is no way that a bank can offer you those terms.”
Salesperson: “If I can get it approved, will you commit to move your business to us?”
Client: “Yes”

11. The “Use of Terms” Close

This is where the genuine objection is “They cannot afford the amount” and you offer payment terms.

Examples:

- Customer: “We do not have 600,000 in our budget”
Salesperson: “When does your new budget year start?”
Customer: “October 1st”
Salesperson: “We’ll take 350,000 now and 250,00 on October 15th. How does that sound?”
Customer: “Great! Let’s do it!”

Note: By offering monthly payments, outside financing etc. you can often close the business.

12. The Balance Sheet Close

This is where you list the reason not to buy opposite the reasons to buy. Always list the reasons not to buy first. Stack the pancakes.

Examples:

- Client: “I’m not sure whether or not we should be outsourcing our maintenance and service work.”
Salesperson: “Let’s look at the advantages and disadvantages.”
- | | |
|---|---|
| <p style="text-align: center;">Disadvantages</p> <ul style="list-style-type: none"> • Upset union by people loosing jobs • You know what your people are capable of | <p style="text-align: center;">Advantages</p> <ul style="list-style-type: none"> • We can absorb those employees and provide them with an opportunity • You know your exact cost • You will get people that will perform to agreed standards • You receive weekly cost and production output data • You get all this at less than you are paying now |
|---|---|
- Client: “I can see there are more advantages. Let’s do it!”

13. The Third Party Close

This is where a third party person is pulled into the transaction to take over or add to the close. This could be a sales manager, older person, more experienced, someone they know, a senior executive or someone with special expertise. Be sure to build the third person's credibility before introducing him/her.

Examples:

- "Mr. Reed will finalise the details with you. He is our financial director."
- My sales manager has the authority to make those kinds of concessions. Let me bring him here."
- Mrs. Le Roux will show you exactly how this can be in 2 weeks. That way we've got it out of the way and we can then get on with the project."

14. The Summary Close

This is where you summarise the buying points on what was discussed leading to asking for the business. On each point, see if you can get a "positive" or "yes" response.

Examples:

Salesperson: "Let me just summarise what we've discussed:

- We agreed that we would give you the performance agreement you wanted.
- We also agreed that one of your engineers could sit on the project team.
- The investment would be over 3 budget years
- You'd get a month end summary every month.
- And that we have a track record second to none.

...If you are happy we would be glad to send you the contract for your attorney's to look over."

Customer: "Send it!"

15. The Similar Situation Close

This is where the salesperson explains to the customer how a previous customer had a "similar situation" or "belief" and how they moved forward or were happy with results.

Examples:

- Mr. Jones XYZ assurance company had also just took over another company and they found that by launching a similar intervention at that time it pulled the people from both companies together because of the common denominator that came from outside their firms.

16. The Empathy Close

This is a close that has to be carefully utilised. It gains enough empathy for you the salesperson to sway the client to a yes.

Examples:

- "Mrs. Strauss, you and I have put a lot of effort into this possible project and it seems to me you are going forward. I'm under continued pressure by our project co-ordination department to try and finalise our arrangements. A yes from you will take the heat off of me."

17. The "Consultant" Close

This is where you have such credibility with the client that the client relies on you and your advice for direction on the buy.

Examples:

- "I feel that you have really looked at the options. That package is the one for you. Take it!"
- Customer: "You know more about this situation than I do. You are the expert. I'm not sure what to do."

Salesperson: "Take a key person and put him on the project for 2 years to be the champion and implement modules 1 to 6 this year and do the balance next year."

Customer: "If you believe that is best I'll do it."



Summary on Closing

1. Closing is not always closing the sale.
It can be closing for the next appointment or next step.
2. Be ready to close at any time the signal is there.
3. Know when to close
 - a) Ask leading questions and listen
 - b) Watch for favourable reactions
 - c) Keep testing and exploring to pin point where the sales process is at
4. Get a succession of agreements.
5. Bring up extra "value added" points and reminders.
6. Use the right close for the right situation.

Summary Statement

If you can't close the deal, try at least to get the customer to agree on another appointment. Thank them for investing time with you. If we've been sincere, really uncovered and filled needs, closing is a natural step. Certain closes are meant for certain situations. Learn to read the customer and the situation and use the appropriate close. Above all ... when receiving the money or having the order signed, look the customer in the eye and say, "Thank you."



Exercise 1: Preparing For The Close

Under each of the 17 Closing Types write down a situation and then enter three closes of that type that could be used in that situation.

Type of Close	
The Situation	
Your Closes	<ol style="list-style-type: none"> 1. 2. 3.

Type of Close	
The Situation	
Your Closes	<ol style="list-style-type: none"> 1. 2. 3.

Maximising Up-Sell and Add-On Opportunities

A number of years ago I walked into a Retail Stereo Shop called A&B Sound in Victoria, British Columbia, Canada.. A young woman of about 18 years of age greeted me. She asked me if there was anything specific I was looking for. The conversation was as follows:

"Yes, I am looking for a set of headphones for my Sony Walkman."

She said, "No problem, they are right over here."

I said to her as I followed her, "By the way, I only have twenty dollars to spend on a set of head phones."

She turned to me and replied, "Why is that?"

It was the first time anyone had ever said that to me and I didn't want to say my wife Beverly only gave me twenty dollars to spend so I said: "The reason is that head phones are sort of like sun glasses to me, I either sit on them and break them or lose them and with all my travelling and them going in and out of suitcases, there is a good chance they will be broken or lost. So, I will only spend twenty dollars because I will probably be back in another six weeks to buy another pair."

She said, "That makes sense. I think I have got exactly what you need. See, these ones here have hinges on them and the chances of them breaking are very, very low. And not only that, they are probably the most comfortable set of head phones you have had on in your life. Try them on."

I put them on, and she said, "Jump up and down."

Now this was a busy store, but she was very cute and I would have done anything she suggested. I jumped up and down.

She said, "See how well they stay on your head ... do you jog or exercise?"

I answered, "No, I do not but I plan to sometime over the next few years."

She chuckled and said, "If you ever decide to jog or exercise these are excellent because they stay so well on your head."

She then plugged them in and the sound was phenomenal.

I then said to her, "These are only twenty dollars?"

She looked at me with a twinkle in her eye and said, "No not twenty dollars, they are forty nine, ninety five."

I said, "You rascal, hand me that twenty dollar pair."

She tossed them to me and again said, "Try them on and jump up and down again."

I jumped up and down and they flip flopped all over my head.

She then plugged them in. They were a third of the sound of the other headphones.

I looked at her and she looked at me and said, "I know you did not plan on paying that extra twenty dollars, but look at the difference. With this pair of headphones you got hinges so the chances of breakage are low and not only that they have a one year warranty. If anything happens to them within a year, we will replace them at no charge. Also you mentioned you travel. Do you fly on jet planes?"

I answered: "Yes I fly a lot,"

She asked: "Have you ever tried to listen to an inexpensive set of headphones with the jet engines roaring?"

I said: "Yes, I have and it was difficult."

She answered: "You will not have any problem with these headphones, you will hear very well."

I said: "I think you are right."

She said: "I believe it is worth the extra twenty dollars for you to take these ones."

I again answered: "I agree, I will take them."

I went to give her my money and she did not take my money. She asked "What do you carry your walkman in?"

I said: "There is a little hook on the back of my walkman that goes over my belt and the walkman sits right here on the front right of my belt."

She responded with: "Have you ever bent over to get in a car seat or sit down and it fell off your belt onto the floor."

I said: "Yes, it has."

She said: "It could be pretty expensive."

I replied: "It sounds to me like it is going to get very expensive."

She asked: "How many tapes do you like to carry when you travel?"

I answered: "Four to six tapes."

She said: "This case here will carry four to six tapes and an average size walkman."

I asked: "How much?"

She answered: "Only Thirty dollars."

I gave in and said: "I will take it."

Just that quickly I had gone from twenty dollars to fifty dollars and then up to eighty dollars. I gave her the money.

Again she did not take it. She asked: "May I ask you one more question?"

I answered: "Go ahead."

She asked: "Have you ever been laying in your hotel room listening to music and all of a sudden your batteries go dead?"

I said: "Yes, that happened."

She said: "And you then have to go down to the kiosk in the hotel and pay a fortune for batteries."

"That has happened also," I replied.

"Would you like a set of batteries to take with you? They are on sale."

I said: "Yes, I will take them."

Now I was at close to ninety dollars in purchase.

I said to her: "Please take my money."

She grinned and looked at my money and as she took it she smiled and said, "I guess you will not be back this way for quite some time."

I said: "You are absolutely right."

She then said: "Well maybe you should take an extra set of batteries."

I replied: "Toss them in, I will take them."

Now if you owned a business would you like to have her working for you? I am sure you would.

I walked into the store to spend twenty dollars and in a fun meaningful way she got me to spend an extra eighty dollars.

This is where the profits are often at in business. Most sales and service people are not maximising those customer contact opportunities or those additional sales opportunities.

The young lady from the A&B Sound Store "up sold me" and then did "add-ons". I spent 5 times the amount I planned and the store saw a great return on investment in those few minutes of the sales lady's time and energy.

She also used the "try and buy" Puppy Dog Close by getting me to try on the headphones and she also used the Alternative Close by letting me sample the two different pairs of headphones. She also used the direct approach and the Shut-Up Close by pausing after she made her final point on the up-sell and the ad-on's.

Taking the time to really find out what the client really needs can make a big difference in the size of the transaction and whether or not you just take an order from the client or really meet the clients' needs and desires. Often we don't need more customers, we need more from the customers already standing in front of us.

I want to share a concept with you called, Beyond Break Even

Let's say your income was 4800 per month and your living expenses including your mortgage or bond, car costs, insurance, groceries, clothes and a number of other expenses totalled 4800 per month. Your net at the end of the month is zero.

Now your 4800 income represents a 30 an hour income. What if someone came along and offered you a part time job in the evenings at 20 per hour for six hours per week. The average person would refuse the offer. Let's take a look at this offer.

Up to this point at 30 per hour you have paid for the necessities and your bottom line at the end of the month.

If you could put in 24 hours per month (six hours per week or one long night) you would have $24 \times 20 = 480$. That 480 is the money that could create wealth through a life time of investment or it could help pay for a vacation, renovation to a home, someone's education, etc. That little extra beyond break-even is a lot in the right context. The additional money with very little extra in investment of time, energy and ability on a sale, through up-sells or add-ons can personally effect your life style and with several people continually doing this in a company it can make a big difference to corporate profits.

Up-Selling

What is up-selling? Up-selling is where I planned to pay twenty dollars for a pair of headphones and the sales lady showed me the value of buying the fifty dollar pair. It is where you move the client or customer to a more expensive purchase of an item or concept.

With up-selling we need to be very alert, aware and listen and ask the right questions. The buyer quite often thinks she needs one thing when it is another that she needs.

- For example in the case of a car buyer. Through questioning and listening the salesperson may determine that the client really may need a model that is a level higher then the intended purchase. To steer the client into the next model up is up-selling and it immediately increases revenue for the company and it benefits larger commissions and sales.

Up-Selling Tips

1. Take time to do at least one of the following when the opportunity presents itself:
 - An informal needs analysis ... gather the right information even if it is just verbally.
 - Mini Needs Analysis – a quick Mini Needs Analysis questionnaire or “quick analysis tick-the-boxes” card.
 - A Full Needs Analysis.
2. Be Aware! “Be Fully and Completely Present and Functional!” This means really see, hear and feel.
3. Utilising emotional and logical buying motives build emotional and logical value for an upgrade or reason for a bigger purchase or a bulk buy etc.
4. Be sincere with your assistance – only upsell if it meets:
 - Real needs
 - Real wants
 - Real desires
 - Real ability to use or pay
5. If the extra cost or price is an issue utilise the “Price Objection How To's” in Module 8.

Add-On Selling

Add-on selling differs from up-selling. The sales lady up-sold me into a more expensive set of headphones but she did add-on selling when she sold me the carrying case and the extra batteries.

- Add-on selling would be when a car salesperson starts adding on the extras like leather seats, mag-wheels, trailer hitch, sunroof, etc.
- It could be a business development officer adding on insurance or the opening of an account along with a loan.
- An insurance agent talking the person into disability and medical coverage on top of a term life policy. It is important to have the add-ons at the tip of your mind and tongue with all products and services you sell.

Another add-on approach is to get additional business from another client.

I once had a building supply client who serviced a small island of clients a short ferry ride from the town.

Whenever they would have a client who placed an order they would phone other clients and say they were making a delivery in the area. Did they want some material put on the truck for them?

It was not uncommon for them to go from a half time load to two trucks. Recently in Zimbabwe a hardware/building supply client of mine tried the same thing with rural farmers. The order went from one order to three truck loads. Adding additional services to an industrial maintenance plan and charging for it would be Add-on Selling also.

If you are visiting a certain area as a representative a similar phone call or “walk in” meeting could earn the same results.

Add-on Selling Tips

1. Make a list of all major products and services as well as most common services and products you sell.
2. Make a list of 3 to 6 potential add-on's for each of those products and services.
3. Prioritise them with the most profitable and most common first.
4. Put them on a list and review them regularly.
5. Consider spontaneously testing each other.
6. Have this information “top of mind” and “tip of tongue”.

7. Within proposals be willing to add the extra's in the initial written proposal. Be sure to create extra value for the extra investment.
8. Consider an add-on prompter with options already filled in so you can glance at it. The two slides show an example of an Add-on Prompter for Banking and a blank one.

Example - Add-on Prompter "Banking"	
Top Selling Service, Product, Concept	Add - on's
1. Mortgage / Bond	1. Cheque account 2. Fire and theft insurance 3. Drapes and landscaping money
2. Opening a cheque account	1. Saving account 2. ATM Card 3. Credit Card
3. Loan for a car	1. Car insurance 2. Vacation money 3. Consolidation of debt
4. Drawing up a last Will and Testament	1. Life insurance 2. Savings account 3. Cheque account 4. Funeral cost insurance

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Add-on Prompter - Exercise	
Top Selling Service, Product, Concept	Add - on's
1.	1. 2. 3.
2.	1. 2. 3.
3.	1. 2. 3.
4.	1. 2. 3.

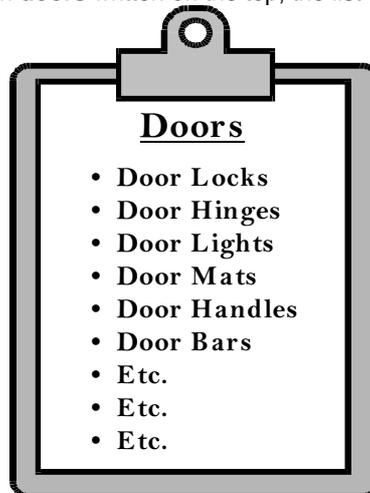
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Clipboard Selling

Where the clipboard selling concept developed was originally with a building supply dealer. If you came in to buy a door from me I would show you the doors.

Once you have picked the tool of your choice I would say, "I will get the door ready for you, but while I am doing that why don't you look over this list on the clipboard to make sure you got everything you need, because there is nothing worse than arriving home and finding out you do not have everything you need to finish the job."

- In the case of the clipboard with **doors** written on the top, the list would include:



While I am away, you review the list and when I were come back I say, "Let me just review that with you." I then review it and quite often there is an automatic sale.

Experienced salespeople often miss the add-ons because they are so focused on the main product, service or issue they are dealing with. Also they may have several other things in their mind that they may be dealing with or have to deal with. The mind can only hold seven chunks of information at one time so it is easy to forget to do the add-ons. This is why a system of some type is so important.

So, Clipboard Selling is taking a specific item, specific service, specific focus or project and building a clipboard or checklist to be reviewed with the client to ensure you've truly helped and they have got everything they need.

Let's look at a few possible examples.

- **In an automobile dealership** there could be a poster or add-on sheet or clipboard developed. When a client decides on a car the salesperson says, "Let's review our **Time Saver** list here to make sure we put everything you need or want on the car, so you do not have to waste your time later." On the sheet would be a list of additions and accessories. It may even be a good idea to utilise pictures and symbols as well.
 - Trailer Hitch
 - Sun Roof
 - Floor Mats
 - Leather Seats



- Mag-Wheels
- Insurance
- Special Warrantee
- **A banker** may have a small add-on reminder system sitting on his desk to remind him to ask about other ways he can help.

Product/Service Request	Add-On Opportunity	Product/Service Request	Add-On Opportunity
Mortgage/Bond	1. Moving expenses 2. New furniture 3. House insurance	Etc.	
Car Loan	1. Vacation 2. Insurance 3. Consolidation of debts	Etc.	

- **A life insurance consultant** to a broker may carry a list of services and products and just do a quick run through using a list to tick off. There always should be flexibility to write new ideas and services and products on the list at the end. That way you combine **Focus Selling** into the system. Focus selling is the next one we talk about.

The tools and concepts of utilising a tool to do add-on selling with is unlimited. Use your creativity. It is also a great way to tune yourself up on product knowledge.

Clipboard Selling Tips

1. List 10 of your main items, services and / or main areas of focus or projects. See Clipboard Selling Worksheet below.
2. Put each of these at the top of separate clipboards, check list sheets or a software template.
3. List all the products, services, packages of additional processes that would be related as an add-on to the main item.
4. Build an attractive “checklist” tool that you could have the client review with you during the buying of the main product, service etc.
5. Use language like: “Let’s take a moment and review this checklist to make sure we’ve got everything covered properly for you in reference to your project. It is easy to miss things.”

Clipboard Selling Worksheet

Main Project / Focus / Item / Service Topics that you could build a clipboard for Clipboard Selling:

-
-
-
-
-
-
-

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By The Way Selling

This is a simple easy way of introducing an upsell, add-on, clipboard or focus sell. It is an easy one to remember and it has a soft touch about it.

- “By the way, you may not know it but XYZ company didn’t take just that package, they added these two extra services.”
- “By the way, before we finalise this you may want to consider tinted windows. That sun can be hard on the eyes over time.”
- “By the way, while you are here you may want to look at our new line of lighting.”

Match Selling / Combination Selling

Match Selling is the combining of two or more products or services that are seen as one offering or where they are displayed together and the buyer wants the combination. Packaging also fits here.

- An example of match selling would be when someone buys a suit and the shirt, tie and braces are on the mannequin or the salesperson encourages you to try three additional items on with your suit. You end up taking what matches, in other words you take the package.
- A **bank** could have a package called a starter package that may include several services relating to newly weds.
- Match selling in **automotive** would be having the specific accessories on or displayed around the car. Mag wheels, low profiles, tow-bar etc.
- An **insurance company** may combine two or three services and products into a package and present all three together.
- Often the perception is that add-ons and up-sells happen after the main sale or at a later date or time. It can happen that way or happen at the time of the main sale. In Presentation Selling you may present all the additional sales opportunities as a package.
- Woolworths Food Stop combined with the Engen Garage on William Nichol Drive in Sandton that doubled Engen's own Foodstore sales separately from Woolworths Food Stop sales is an example of Combination Selling.

Match Selling / Combination Selling Tips

1. Search for fast moving or popular products / services that could be combined with other good products / services as a package that would move more of both.
2. Find good products / services that could be combined with slower moving products in a package that would bring the slower moving items closer to the fast moving products.
3. Check showrooms, offices, stores, displays and catalogues to see where items and services could be grouped and / or packaged to give a stronger focus in that area. Is it possible to match sell?
4. Explore whether it is possible to combine the expertise of several people to make a stronger value added offering to the client e.g. Total Account Management Team.
5. If you offer many services now, can you combine several of them into various levels to create less expensive packages all the way up to comprehensive value added packages?
E.g. Basic analysis of performance of specific machinery in a plant on a monthly basis (Performance Enhancement) up to a total outsourcing package. (Total Freedom Package)

Focus Selling

Focus selling is where you focus on one product or service. In retail here is how focus selling would work.

As the manager of a furniture store I may take a specific sofa set and tell all staff to focus on it for a week. So when they were greeting people or finishing off a conversation, they would say: "While you are here you may want to check out the special we have on a sofa and matching chair. Even if you do not need it yourself, you may know someone else who does. Take a look at it. It is a great deal. It is right over there." Now if all staff do this, the focus on that product will sell it. Even though we all do our add-ons and up-sells we could improve by weekly or monthly literally deciding to talk to all our clients and customers about a specific product or service, in whatever kind of meeting we have with them. Naturally there may be times we do not because it is not appropriate, but you obviously get the concept. It works.

- **A life insurance** salesperson could decide also to mention a specific retirement savings package.
- **A banker** could decide to mention a new type of personal or business bank account.
- **A hawker** could mention a beautiful table cloth.

Other examples:

- Electrical Engineering Distributor – "We definitely can handle that major re-wind project. I also must tell you, for the next two months we are offering a once off special "Introductory Offer" on our new small motor generators. I thought I'd mention this just in case you might need some small motor generators in your plant. They are "state of the art."
- Banking – While I'm here I must tell you about our new 60 day best return "short term deposit" package that is unbeatable.

Focus Selling Tips:

1. Daily, weekly or monthly always have one specific service or product that you decide to mention to all present and future clients.
2. Take time to understand why it is valuable for all clients to be told about the product or service.
3. Develop 2 or 3 sincere "non-hardsell" statements that would make the client see you are doing them or someone they know a favour by telling them about this offer.
4. Mention it to as many clients as possible and allow them to respond.
5. Watch the sales increase on that item, service, package etc.

Down Selling

It is not uncommon for a potential buyer to have champagne taste on a beer budget. In other words they may initially be over buying. By close observation you can detect this and in a respectful courteous way you move them to what makes more sense for them at this time.

If you do not detect it, and put a fair amount of time into demonstrating and talking about the product or service, the potential customer could feel obligated and would not want to demonstrate he does not have the money. So what commonly happens is that the potential customer makes up an excuse for not buying now and exits. Then, immediately he goes to someone else and buys the lower price one.

What he does is save face with you who he actually developed a bit of a relationship with. You do not know he has gone elsewhere so he bows out gracefully.

If you down-sell at the right time you will get business you would have missed.

Also, there are times that someone is going to spend far more money than they need to. Through down selling to meet the client's real needs you avoid an unhappy customer in the future.

Down Selling is a situation where someone is initially over-buying and in a respectful courteous way you move them to what is more in line with their needs. "Champagne taste on a beer budget."

Advantages of Down Selling:

- Client can get sold on something she cannot afford and after she finds out the price is too high may make an excuse for not buying and leave. If you "down sell" you could save the sale.
- By down selling to what is reasonable and explaining the reasons to clients they appreciate it and often upgrade later and they become long term clients and referral sources.
- You save and invest both yours and your client's time, energy and ability, when you recognise a "down sell" situation and you down sell.

Note: "Be cautious when you down sell you do not want to insult the other person."

Examples on Handling Down Selling:

"Mr. Khoza, we've also got a special on a Boss Suit over here that is every bit as good as this one only it costs half the price. I've had lots of senior executives buy one."

"Everybody wants the "Exclusive Travel Package" because of all the add-on luxuries ... although many people take the economy one and use the extra cash for doing their own touring when they are in Spain. It is 30% less, than you got the extra cash to do what you want to do with it!"

Cross Selling

A lot of people use cross selling as a term for add-on, up-sells and a number of other ways that you create additional revenue during a sale. In this case and on this program we are not using cross selling in that way. Over the years I have used cross selling in more of a literal way.

Cross selling means to cross sell into another department.

- Example: I may be opening an account for a client at my bank and I discover she is buying a new home. I immediately mention that someone in our bond/mortgage department would be keen to talk to her. I then take the client across to the mortgage manager. I am cross selling into another department.

Cross selling would be a visual display of services or products from another department that are promoted in your department, but the additional purchase would be made in the other department.

You will often see retailers in a shopping centre where they cross promote each other's business, encouraging shoppers to go to their friends store to pick up additional things their store does not carry.

Strategic alliances with another company that offers a service or product that goes with yours. A building supplier may promote a specific handyman or plumber to do the installation of a product bought from the building supply store.

When I was in the broadcast industry I used to meet with a cash register salesperson regularly. If a new retailer were opening, she would mention the importance of advertising and pass the business opportunity on to me. I would do the same. This was a combination of cross selling and cross promoting.

Cross Selling Tips:

1. Make a list of internal and external individuals, departments, divisions and sister companies and external companies that do an ample amount of business with your target client / customer group.
2. Prioritise the list into ABC's.
3. Start with the "A's" and develop a list of what items and services they could cross sell, cross promote, cross display and cross refer for you and what you could cross sell etc. for them.
4. Determine how both of you could help each other sell more of the above.
5. Set a meeting with them and explore the opportunity.
6. Build a data base of these people, divisions and companies and set regular "strategy meetings" and implement joint monthly tactics.
7. Show appreciation and thanks ...

Summary

In this module you:

1. Learned about the 17 ways to "Close A Sale" and how to recognise a buying signal.
2. Completed exercises on Maximising Sales Opportunities and learned processes on that topic.



Proof It Works

On May 27, 2004 this letter arrived in my office. My son, Shane Gibson sent me this letter he received from a very happy client. The results you will read about were a direct result of Shane getting Wayne Le Gear's sales team to memorise three ways to do add-on sales on just one short term insurance product and focusing on just 3 opportunities to Cross Sell with other people and divisions affiliated with their organisation. It does work.

After reading the letter got to Exercises 2 to 5.

Dear Shane;

I'm writing to thank you for the sales training & management sessions you conducted on behalf of our company. The feedback from both our front line staff and managers was very enthusiastic and positive. Many of us attend quite a few industry related training functions and your sessions were ranked as among the best ever!

I also wanted to write and make you aware of the results generated by the sales training you conducted on our automobile replacement cost "focus" product. Let's face it.... enthusiasm is great but you can't beat results. Here's what happened. During the first three months after your first session we increased unit sales of this product by 15% and we increased gross revenues derived from this product by an amazing 85% as compared to our 2003 figures for the same period. Although these numbers are great in their own right it becomes even better when you factor in the fact that there was a 25% decrease in opportunities to sell the product as a result of depressed auto sales during the first quarter of 2004.

The numbers speak for themselves regarding the value your sessions have given our company. However it should also be noted that in addition to our increased profits we have obtained quite a few additional benefits. Our staff is enthused and excited about the sales process (they're having a lot more fun at their work); our staff have increased their personal compensation as a result of additional commission income on their pay checks (everyone likes to make more money); our managers are much more effective in controlling and directing the sales process and also enjoying satisfaction and benefits as a result of the increased policy sales.

In summary, Shane, your work with us has improved morale, contributed to a "sales focused" work environment, allowed most of our people to increase their personal compensation, and given our company a much healthier bottom line. Thank you.

You've brought a lot of value to our organisation and we look forward to our future sessions together.

YT

Wayne LeGear
Vice President - Auto Insurance
TOS Insurance Services Ltd
a HUB International Limited Company (NYSE: HBG)
604.533.3891
www.tos.ca



Exercise 2: Add-On Selling

List ten of your top selling services, products, concepts etc. and then list at least three add-ons if possible.

Top Selling Service, Product, Concept, Etc.	Add-Ons
1.	1. 2. 3. 4.
2.	1. 2. 3. 4.
3.	1. 2. 3. 4.
4.	1. 2. 3. 4.
5.	1. 2. 3. 4.
6.	1. 2. 3. 4.
7.	1. 2. 3. 4.
8.	1. 2. 3. 4.
9.	1. 2. 3. 4.
10.	1. 2. 3. 4.



Exercise 3: Match Selling

Put together your own "Match Selling" package. Show items or services at the same time or as part of a package. Put together three different match selling packages you can sell with over the next thirty days.

Match Selling Package 1

Match Selling Package 2

Match Selling Package 3



Exercise 4: Cross-Selling

What are the opportunities of cross-selling in your company, within departments, with other departments and with affiliated companies?

Cross Selling Opportunities

1. _____

2. _____

3. _____

4. _____

5. _____

Put a plan of action together to set this up with co-workers, associates, other departments and companies. It is an additional sales opportunities for you and the company.



Exercise 5

Over the next two weeks create your own clipboards, posters, desk reminders, add-on sheets that you could use on every sales call to help you increase sales through add-on selling. Be prepared to work with your team, sales manager and trainer on these tools.

Exercise 6

For the next four weeks utilise focus selling on the job. Write down what your focus of the week will be and review your observations with your associates or your sales manager.

Focus

Week 1:	
Week 2:	
Week 3:	
Week 4:	

Observation

Week 1:	
Week 2:	
Week 3:	
Week 4:	

Module 10

Taking Control Of Your Own Economy

Learning And Sales Development Outcomes

In this module you will:

1. Take better control of your own economy by reducing stress and worry and become more productive.
2. Learn how to use the Stress Thermometer and Worry Chart to enhance your personal and business life.

***Ntsika Enterprise Promotion Agency,
with a focus of rendering non-financial support to SMME's
is part of The Department of Trade and Industry in South Africa.
Ntsika, along with the support of The European Union
assisted in the Initial Development of the
Boosting Sales & Profits With Focus Selling program
in conjunction with Knowledge Brokers International Limited.***

Module 10 Taking Control Of Your Own Economy

‘N ever before have had we had to do so much with so little time and so few resources.’

The hectic pace of today’s workplace combined with trying to balance work, play, home and social obligations annually takes it’s toll on salespeople, executives and staff at all levels in corporations world-wide. These factors, along with constant change and a turbulent market place have severely eroded profits and productivity. This module is a must in today’s world of selling.

It is about you personally ... not about your business. It is about how you can “take control of your own economy” by reducing personal stress, worry and anxiety and becoming even more productive.

If you can drop your stress level just one iota it can make a major difference in the way you interact with clients, family, business associates and with yourself. This module will assist you to do that.

Awareness And The Stress Thermometer

“**Awareness** always precedes **choice**.”

“**Choice**” then precedes **action**.”

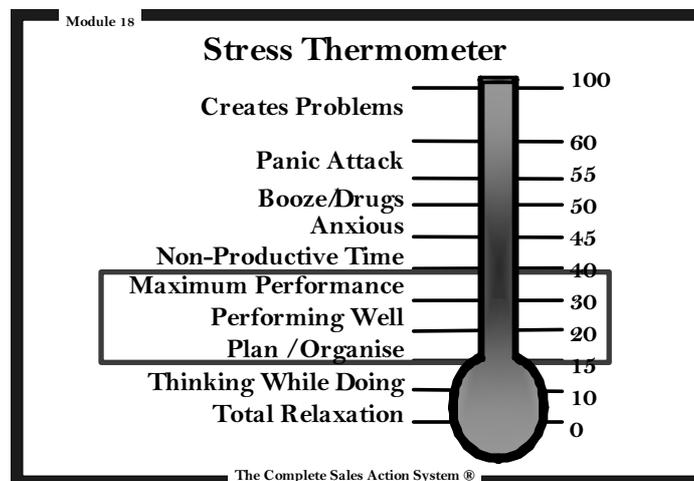
“**Action** then precedes **changes**.”

In order to lower your stress, it requires change. In order to change you need to become aware in the first place.

Awareness is the key. Many people are stressed and do not even that they are.

Have you ever asked someone: “What is wrong with you today?” and they snap back with “Nothing is wrong with me!” They are stressed and do not know it.

A tool that you will be provided with in this module is the Stress Thermometer. The purpose of this tool is to help you become aware of where you are on the stress scale at different times and in different situations through the day. Then you can make a choice which leads to action which leads to change ... a change in your state of mind. As Wayne Dyer says, “There is no such thing as stress ... there is only stressful thinking.”



Following is a brief description of the various levels on the Stress Thermometer and activities or actions that might take place.

0 - 10

Zero would be total relaxation. Anything below zero would be moving towards the sleep state. The 0 - 10 zone is when you are just “hanging out,” doing very little, taking it easy. There is no stress here.

There is a time for rest and relaxation and a time for work. When you are in the relaxation zone, really enjoy it. Realise you are probably restoring your mind and body and getting ready for some real activity. We all need to be rejuvenated. Spoil yourself.

For example:

- Take a long warm bath or shower
- Have a massage
- Take a sauna or steam bath
- Lie in the sun
- Listen to some music
- Watch the sun rise or set
- Listen to the birds sing
- Take a walk

What is being suggested is that you actually can make that time an even bigger asset by consciously choosing activities and methods that rejuvenate you even more.

10 - 15

More activity is occurring but it may be that you are doing one thing while day-dreaming of another person or activity. This activity does not require your undivided attention. The activity relaxes your body and mind but it allows the mind to drift and think of many things. In the 10 - 15 state, you could be making headway with "not-so-vital" tasks that need doing.

For example:

- Clean up your office, home or car at a time you do not feel super productive.
- File and organise trivial things that you have put off. The trivial things do not use your mind power and thus allows the mind to roam, often picking up good ideas, concepts and answers.
- During these activities, keep a writing pad and pen handy to catch valuable ideas. This way you maximise the activity, the relaxation and the spontaneous creativity that surfaces.
- Work in the garden.
- Mow the lawn, trim the hedges, and wash your car.
- Go for a drive in your car and drop off a few things at people as promised, or pick up a few things you have been meaning to get.
- Do some fishing in a relaxing way.
- Driving to work on automatic pilot may apply here.
- Work on a hobby or work at a craft that relaxes but does not require an intense focus. E.g. you often see people knitting a sweater while watching TV, talking to someone else or listening to music.

15 - 20: Planning And Organising State

You have all experienced frustration because you had too much to do and were not quite sure how to do it. Then someone says to you "Calm down, let's just sit down and list the issues and put a plan of action together to handle it." You sit down with that person, begin to draw up a list and a plan... the stress begins to subside. Once you are into this process you feel better because you start to see the possibilities and solutions. Planning is excellent medicine to reduce stress. Here is what you may want to do:

- Research and gather prospective names, addresses, etc.
- Sift through books, magazines, videos, audio's looking for ideas and concepts that could be useful for selling or useful for clients.
- Update your personal and business address book.
- Develop systems to make your daily job easier and more efficient.
- Set up a Data Base Selling System.
- Brainstorm client objections and answers to them.
- Plan your day the night before.
- Work on a four month projection of sales.
- Categorise your client list into A, B or C's.
- Set goals and build creative goal boards and dream posters.
- Plan your vacation.
- Plan your dream home.
- Set out your call strategy for a territory.
- Divide a large project into chunks that make it possible to tackle.

20 - 30: Performing Well State

Someone says to you, "How is your week going?" You answer, "It is going well." This means there is a calm flow of positives, everything is falling into place. You may want to;

- Stay relaxed and continue with your routine. E.g. Setting a certain number of appointments and making a certain number of calls at a steady pace over a certain number of days.
- Enjoy this state for what it is. It is a state where you are flowing with relaxed alertness knowing that it could heat up and get busier, slow down or get hectic.
- Work on proposals and strategies as part of your routine. There is a coasting effect but there is enough momentum that you can fit these eventual business building tasks in as part of your day or week. It is the planting of the seeds for the future which could be the maximum performance state.

30 - 40: Maximum Performance Area

Someone comes up to you at 2pm and says, "Are you not stopping for lunch?" You say "Lunch, I was so into what I was doing, I thought it was noon and I even forgot to get hungry." Then you stop for lunch when maybe you should have had sandwiches sent to you and continued to work.

Momentum is one of the great keys to business and sales success. When you are on a roll things really get done. During these periods it seems as though you cannot do anything wrong. As a matter of fact it does not just feel like your skills and abilities are working; you actually see "luck" working in your favour.

In the Maximum Performance State you can handle three times as much work as in the same period of time with a whole lot less effort. This is the time you put in an 18 hour day and still feel great. When you are on a roll, protect it.

You are on a roll. Creativity is running at its maximum and your mind is sharp and your energy is there. My suggestions would be;

- Clear the deck of details and trivia and go after what counts. You attract and sell customers easily when you have got the momentum. Success is written all over you.
- Protect this state. Do not stop and take a day off or go and throw yourself in the middle of an energy draining personal or business relationship. Once you are yanked out of this state it may take a while to get back into it. Make a commitment to yourself.
- Work 18 hours a day, jam as much important stuff in as you can. Take advantage of your power. You can relax later.
- 6 - 8 hours sleep and the rest of the time working is okay when you are feeling great.
- Don't quit too quickly. By the 20th of the month you may be at 90% of your budget and expect to reach 130% of budget. The big mistake that is often made is that the salesperson believes it is in the bag, changes the thrust, maybe takes a break and then has a cancellation, cannot get back on focus and does not go over budget but just hits it or falls short. Remember when you are rolling you can easily over project on sales and underestimate the time, energy and money you may be investing. Always go the extra mile for good measure when you are really performing.
- Be aware of your diet, etc. In other words don't do anything to knock yourself off stride like drinking too much alcohol, coffee or over eating. A hangover may prevent you from "hitting the streets" the next morning.
- Follow your intuition. If a client comes to mind or you pass by a business you think you should call on, act on it. Your whole brain is probably sending you a well calculated signal.

40 - 45: Non Productive Zone

The scene: You are trying to get a job done and the person alongside you will not stop talking to you. You begin to feel tension.

The scene: You are in a meeting. You have lots of important things to do and you are finding the person running the meeting is wasting time, is boring and giving you nothing you can use. Tension builds.

This is the **Non-Productive Zone**. In this state you feel tension building because of wasted time, needless hurdles, etc.

When in this zone here are a few ways to reduce the stress.

Recognise what is wasting your time and if it cannot be changed immediately put a strategy together to make sure it does not happen again. Examples of these could be:

- A co-worker talks your ear off about his/her social life the first thing in the morning while you are trying to be productive.

Solutions

- Set up an agreement with your co-workers first thing in the morning. If you are working on something vital you have a small red flag that sits on the desk... you are on a roll... don't disturb. If you are working on something that does not require your concentration the orange flag goes up. With the orange flag you are open to stop and answer questions in reference to business. The green flag means everything is out of the way, you are in a good mood, "lets shoot the breeze."
This system actually worked for management and staff of a bank the first thing in the morning. People were coming to work early, but not getting the vital things out of the way because of the amount of idle chit-chat. This system re-focused the entire group.
- Change your desk location or the way you are facing. This could diminish the problem.
- Clearly announce you are under pressure and have to get something finished. E.g. "Please do not talk to me for the next 45 minutes."

- A client talks on and on and on and you feel the pressure because of other tasks that you have to do.

Solutions

- Next time see him/her at the end of the day and do not have other important things to do immediately after the appointment.
- Announce your time constraints at the beginning of the meeting and do a bit of a count down to focus the individual.
- Make a semi-social business call by going for a Friday lunch or dinner allowing lots of time for chat.

- A company meeting drags on and old news is recycled and the topic is one you have heard many times without tangible solutions. You develop stress because you could be somewhere else doing something that you consider to be productive.

Solutions

- Make a statement to the person holding the meeting and to the others involved to let them know how you feel. It is important that the statement be a non-blameful "I" statement. Collect empathy from them rather than defensiveness. Remember, describe their behaviour in a non-blameful way, let them know the tangible effect on you and/or the company and share the feelings the behaviour is creating in you.

E.g. Charles, I have a concern. The topic that is being discussed is one we have not solved before and we are bringing up the same issues. I do not see an immediate solution but I could see this discussion going on for a while.

I had planned to be out of the meeting by 9am, I have a major proposal to finish, by 10:30am and if I stay in the meeting for another 20 minutes, I could miss having the proposal together for my noon meeting, resulting in a loss or delay of us getting a large contract. I am starting to feel anxious.

This statement is not blameful. It describes the behaviour in a non-blameful way, the tangible effect on the company and the feelings you are having. There is a good chance of a buy-in from the others. They either excuse you or wrap up the meeting.

The "I"-message approach could work in many non-productive situations to get you out of it.

- Get an agreement from the sales manager that in the future you can leave at a specific time while at the same time the discussion is moved to another time, or those who want to stay, can. Set up an amiable prevention plan.

45 - 50: The Anxiety State

This is where you run from pillar to post all day long putting out business bush fires, always in a state of anxiety. You feel as though something is eating away at your stomach. Your breathing is even more shallow.

In other words you cannot seem to make anything productive happen because of bush fires and situations beyond your control.

A few ways to reduce your anxiety level when in this state are:

- Change your plan. One of the reasons you are upset is because things are not going the way you had anticipated. Cancel or change the plan you originally had and decide that you are an expert "bush fire fighter" and make it a "bush fire-fighting day." See how good you can be at bush fire fighting. A lot of the things you wanted to do can be done another day ... or maybe they have to be done on another day.
- Move as many of the crises or unexpected urgencies as possible into a time slot. For example agree to handle the ones that can be delayed between 2 - 4pm, handle the vital ones now and be productive between noon and 2pm. Negotiate.
- Call for help. Tell your sales manager, your associates and your support people about the fires you have going and the other commitments you have. Ask for help and solutions. You may be surprised how many of these can be handled by someone else. You volunteer to reciprocate. Another example in the 45 - 50 areas could be the anxiety building up because of a few cancellations. You thought you could reach your budget and the clients are not buying. You are in a deep slump and you fear missing your target or making the money you need. You have run out of time.
- Face it now. Go to your sales manager and lay it on the line. Ask for help and input. It will reduce his stress because he has time to act and possibly find other alternatives for you to reach target, or for others to go over target to pick up the amount you missed. This could get you back into re-planning and launching a solid plan to make sales happen in the next few months.
- If personal financial stress is tied to this, then face your creditors in advance and pre-warn them about the delays. Make a reasonable plan to catch up. This gives you a breather and reduces the anxiety so you can perform better.

50 - 55: The Exit Sate

This is where the anxiety, tension and pressure gets you to a certain point where you look for a quick way to change the state of your mind and your body, temporarily giving you a break. This is when people often use alcohol, drugs or other unhealthy stress releasers to exit for a mini vacation that may last an hour or a day.

A few healthy suggestions that could be useful to give you that temporary break are:

- Go to the health club and sweat it out of your body and mind. A strong workout that physically relaxes you can literally take your mind and put it "in neutral."
- Listening to relaxation tapes and relaxing music can do the job.
- Dancing or listening to up-beat fun music can give you that mini vacation for a few minutes.
- Immersing yourself into your favourite hobby can take you away from the build up of problems.
- Fishing, going for a walk, playing team sports or watching a humorous movie could do the trick.
- Verbalise how you are feeling to a good friend who will listen. Get it off your chest.

The key is to know what the healthy alternatives are. The habit of a drink of alcohol to reduce the stress is a tough one to break. It is possible to break that kind of habit by having other alternatives on hand that work. All it takes is building up a memory of success to get into the habit.

55 - 60: The Panic Attack Area

This is where you lose your temper, blow up over little things or lose your ability to think logically. You are in a panic attack area. Some people literally have a physical panic attack where they cannot breathe very well because of the tightening of the muscles in and around the heart and in the pit of their stomach.

A few thoughts to help you if you are in a situation that seems to be triggering these symptoms.

- If other people are around you, it may be wise to excuse yourself immediately and go to the washroom, or go for a walk and do some deep breathing.
- Go punch a punching bag or hit the pillow to get it out.
- Write down everything that is getting to you. This will be discussed more in-depth in module 19.
- Try some of the solutions in the 50 - 55 state.
- Go have a good cry.
- Write a letter to really tell people how you feel about the issues and about them. Do not mail it. Destroy it but use this as a way to ventilate. (Alleviate the stress).
- If you are in an appropriate physical surrounding you may yell as loud as you can about how you feel.

60 - 100: The Continually Stressed State

This is where people go for long periods of time holding on to resentments, problems and guilt or simply live in an environment of continual stress. Holding continual negative thoughts in your mind and continual negative energy draining feelings in your body, over time manifests such illnesses as heart attacks, cancer and ulcers. They can often be the result of eating and drinking habits that are caused by the continual stress.

The most important factor in this state is to recognise that you are in a continual stressed state and if you continue to be in this state most of the time you will develop a disease of some type. This is serious.

A few solutions for this state are:

- Re-examine the things that have caused you to be in this state. Decide how important they are and compare their importance to the importance of your health or your being alive. This could eventually be a life and death situation. This may leverage your thought system enough to decide that the pressures have very little importance. That will change the way you deal with them.
- Explore your belief system in reference to these pressures. Maybe it is not even your belief. It could be a belief that society or family has taught you, to help guide you but was not meant to destroy you. Look for examples of other people who took a different view of these issues and have done just fine. Read books, take seminars and listen to tapes on changing and understanding your beliefs.
- Look at what is bothering you and see if a lot of the stress is being created because of your refusal to be flexible, or your inability to change your ways. Take a course on change, talk to others who are successful, but view things differently. Remember the small tree survives a wind storm because of its ability to bend with the wind instead of resisting and being non-flexible.
- Look at what is bothering you and see if some of the things that are causing you stress are happening because you are afraid to fail and deal with the truth. Identify what it is you are refusing to do, or refusing to change your mind about, and put the issue or issues through the leveraging exercise found at the end of each module. This can help shift you out of the state you are in.
- Buy books on releasing stress. Listen to stress release tapes. Attend workshops and lectures.
- Book a few hours with a therapist or counsellor and process what is bothering you. It is amazing what you can learn in a few hours. It may take some professional assistance to change some of your beliefs or behaviours that are continually holding you in that 60 - 100 zone.
- Continually utilise positive self-talk affirmations to help keep you productive, energetic and growing. Word your self-talk in a positive pro-active manner rather than a negative manner. Here are two examples of positive and negative approaches to self-talk. Both have good intentions but the positive one is more effective.

Negative: I will not let family, friends, business associates and other outside forces **stop me** from being productive.

Positive: Everyday, in every way, I am becoming more and more productive.

Negative: I will not let challenges and problems drain my energy and **stop me** from succeeding.

Positive: I tackle challenges and problems with vigour and vitality.

Other examples of positive affirmations are:

- I tackle challenges and problems with vigour and vitality.
- I have a phenomenal source of creativity handling all issues with an open, creative mind.
- Everything I touch turns to gold.
- I am worthy of success.
- I continually attract business.
- I organise and plan my day with ease.
- I handle all client objections in a sincere non-threatening way.
- I comfortably utilise the right close in the appropriate situations with clients.
- I am more and more aware of other people and where their feelings, words and actions originate.
- I comfortably match, mirror and pace people.

As you can see, it is quite easy to develop affirmations on topics or issues where you need improvement. By writing them on a card and repeating them several times a day you are re-programming your mind. While these positive affirmations are being repeated the thought about negative ones cannot intercede. Put them on the wall at home, on post-it notes in your car, in your day planner or on and around your desk. Surround yourself with new thinking.

Following are some affirmations that have been known to help people heal themselves from illnesses and release stress. These loving affirmations can be helpful in enabling you to realise the state of mind that heals wounds and resolves suffering.

- I am healthy and strong and free of illness.
- I love and accept myself exactly as I am, and I am taking care of myself.
- My courageous stand for health is calming my emotions and healing my body.
- I accept all my feelings, even the negative ones.
- In this acceptance I pass through the negative into the positive.
- I accept other people as they are, with all their imperfections.
- I am good enough.
- I let go of the misery of the past.
- I let go of my belief that life cannot be wonderful and joyful.
- I am open to the belief that life is wonderful and good and I am ready and open to receive my good.
- I am grateful for my many blessings.
- I am free to live a joyful life.
- I open myself to receive the wisdom of the universe for use as guidance and direction in my life.
- All is well in my world.
- There is nothing to fear. I am safe.
- The words I say are right and appropriate.
- I am on my path in life.
- All the help I need is here for me.

One other approach is to record your own "self talk" and listen to the tape regularly.

There are many suggestions far beyond the few you have just received that can be of real assistance in learning to get the best out of each state, or to reduce those that have a negative effect on you. Reducing stress and performing at your maximum is important to both your business and personal life. We suggest that you continually read books and articles on the subject, plus utilise tapes and seminars. You can never be over-trained on these skills of staying productive, healthy and happy.

The last and final suggestion in reference to the stress thermometer is to **regularly check your stress thermometer.**

It is important that we take time to monitor ourselves in reference to where we are on our own stress thermometer. Put a dot on your watch and each time you look at your watch it will remind you to check your stress level. This way you can check how often your subconscious mind may be kicking into gear with wrong information pushing up your level of stress. Keep asking yourself questions like "Am I prejudging the situation?" "Am I worrying about something that's not really going to happen?" "Is a past experience kicking in and throwing me off?" "Is the situation exactly the same as the last situation?" "Is this issue one of my priority issues or is it a petty issue?" "A year from now, how important will this be to me or what impact will it have on my life?" "A year ago I had a situation similar to this, can I remember it and how much impact did it have on me?" We can also say, "This too will pass." Have an action plan pre-set for each zone you land in.

Exercise 1:

- a) It is great to be "red hot and rolling" in the **maximum performance area**. What are five things you will implement to ensure that you do not pre-maturely take yourself out of the maximum performance area?
- b) List the three top situations that cause you to be in the 40 –45 non-productive zone that build anticipation or some anxiety within your system.
- c) When you are having one of those "bush fire fighting" days (45 –50 level) what are two things you could do to reduce it's stressful impact on you?
- d) When you hit that 50 –55 **Exit State** where you've just got to have an "out", what are three healthy alternatives you presently utilise or will utilise?
- e) Everyone hits that point of flying off the handle, saying things we may regret out of frustration or just plain panic. If you find yourself in this situation what are two procedures, actions or tools you could use to avoid negatively affecting yourself and others?
- f) If you happen to be uptight most of the time and can see yourself in the 60 – 100 zone, what are three things you will do to help get you past this period in your life and put yourself back on track?



g) Who do you know who spends a lot of time in that 60 – 100 stress zone of being “continually stressed” about life, situations and other people and their behaviours?

- | | |
|----|----|
| a) | b) |
| c) | d) |
| e) | f) |
| g) | h) |
| i) | j) |

h) On five of them can you identify the two main reasons. E.g. resentment, feeling victimised, needing to try and control others, can't forgive, need to get even, can't let go of a situation or someone not telling themselves the truth, etc.?

	Name	Reason 1	Reason 2
1.	_____	_____	_____
2.	_____	_____	_____
3.	_____	_____	_____
4.	_____	_____	_____
5.	_____	_____	_____

Reducing Stress With The Worry Chart

The objective of this section is to show you how to really capitalise on your time, energy and abilities by eliminating the useless “personal asset wasters” with a simple but logical tool called the worry chart.

Years ago I picked this worry chart off a tape voiced by the late Earl Nightingale. I have shared it with at least half a million people. It works!

You have no doubt had the experience of thinking of something that upsets you. Then another thought jumps in and says, “What about me?” and a third shouts, “Do not forget about me.” Before you know it, your emotions are out of control and you are having trouble sorting out solutions for all these issues that keep bombarding you. Stop! There is a solution. Become productive! Once you become productive I am sure that you will start to notice the stress leaving.

When you find yourself getting upset, it is hardly ever because of one thing. It is usually a series of things whirling around inside you. Take control by pulling out a piece of paper or turning your computer on. Then move into the planning and organising state, which is a productive mode. List every single large and small thought, issue, or situation that is bothering you. I am talking about every one of them, including something someone is wearing that bothers you, a statement made by someone two years ago that is still upsetting you, a possible circumstance you are worried about that may happen tomorrow, and a regret you have been carrying for years. The key is to search and unload them all.

What has happened? You have taken all of these issues out of your mind and put them on paper or in your computer. Now you can see them from a distance. You are less emotional.

Module 19

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- 40% Of All Things We Worry About Never Happen
- 30% Have Already Happened and We can't Do Anything About Them
- 12% Needless Worry About Health
- 10% Petty Miscellaneous Issues
- 8% Real Worries $\frac{1}{2}$ We Can Do Little About, the Other $\frac{1}{2}$ We Can

Take Positive Action Now

The Complete Sales Action System ®

What I am going to share with you now is a very logical, simple method of reducing stress and anxiety.

40% Of Worries & Anxiety Will Never Happen

Let's review the issues that bother most people. Forty percent of issues will probably never happen the way we think they are going to happen.

Frequently we get ourselves uptight about what we think might happen. Say a couple is planning to take a vacation together, and he says, "Let's go to Hawaii." She answers, "What, and watch you gawk at everybody on the beach." They have not even phoned the travel agency yet, and a major problem is brewing.

In sales, the telephone rings just two hours after a major client decided to buy. The receptionist says it is the client on the phone. You think the client is going to cancel.

We can get caught up in the 40 percent of worries that will never happen the way we think they will. We create a whole lot of illusionary problems in our minds that we do not need. So, your first action on the worry list is to identify those things and tell yourself, "Hey, this is silly, they will probably never happen." Write 40 percent beside each one that fits this description.

30% Have Already Happened

Another 30 percent of these worries have already happened, and you cannot change them. This is the past - the mistakes you have made that you will not forgive yourself for. It is the guilt that you hold inside, the resentments of grudges you harbour. Remember that failure is not opposite to success, failure is part of success. In every failure is the seed of success. Ask yourself, "What are three positive things that can happen for me because of this situation?" The mind will always give you an answer. That is why it is so important to ask positive, result-seeking questions. If you say, "Boy, did I ever blow that, what a dumb person I am," the answer will be something like this: "You sure are dumb. Let me tell you two other areas you are a failure in. I do not even know why you get out of bed in the morning, you weakling."

Often I talk about second-try situations and how you can find opportunities there. I can go into any community and, with the assistance of local people, make a list of all those businesses or concepts that have failed in the past and find an opportunity. The business might have failed for a number of reasons: inexperienced owners, they could have been ahead of their time, maybe they were undercapitalised; possibly they knew very little about marketing; maybe they had a poor location. Just because that business failed does not mean that it will not work now. In your own business, it is a good idea to frequently review ideas and strategies that you have attempted in the past but failed at. Maybe today some of them will work. The past, like the future, is a great place to find opportunities.

Another area that causes stress, but is something we cannot often change, is how we look. Some people spend a lifetime wishing they looked like someone else. The features that we were born with or that have been bestowed upon us accidentally are of the past and are quite permanent. In most cases, we can only make minor changes to these features. Some people are tall, others are short; many have long noses; many people are overweight, some people are bald, others have big ears, some are too skinny. We are all unique in one way or another, and we are often identified by those unique features.

I have fairly big eyes and they stick out. For many years I was very self-conscious about my eyes. I grew up in a small Nova Scotia community called Newport Station, Hants Country, with a population of almost 400 people. At the age of 1, I had a head the size of a large grapefruit, no hair on top, and eyes as big as they are now. Picture a set of adult eyes on a grapefruit. That was me. Fortunately, I eventually grew into those eyes.

Now in those days they did not take “parent effectiveness training,” and in 1946 my mother took a photograph of me at the age of one and wrote “Tweetie Bird” across the top. When I was four I picked up both the photograph and a Tweetie Bird comic book and finally got the picture of what I looked like.

Around the same time, my aunts from around the country would come to visit and innocently say things like, “Oh my gosh, look at the eyes on that little Billy. If you whacked him on the back of his head, they’d pop right out on the floor.” And at that age, I did not know how to hold them in. They would sort of roll out and up when I looked at adults. At this point I began to be slightly embarrassed. I started school with very kind children; they nicknamed me Popeye. I got in fist fights until I realised that it was just the big guys looking for a “live punching bag.” I quickly stopped fighting.

I came to the realisation that anything can be an asset if viewed or used the right way. When I was thirteen, my friends and I started going to community and school dances. We would go into a dance at about 9:30pm, warm up for about two hours, and then make our way across the floor to ask a girl to dance. Just as we would get there another fellow would ask her to dance. We would then do an inconspicuous pivot and go to the washroom thinking no one saw what happened. We would arrive back from the washroom and be greeted by our support group from the locker room. One fellow would say, “She saw you coming, and she beckoned him over. Another would say, “If you really want to dance go over and ask that girl over there. She’ll dance with anyone.” Off you would go, knowing that she would dance with you. You would ask, and she would reply, “You have got to be kidding.” In the middle of all the applause and laughter from your friends you would make your way back across the floor. What memorable moments!

I tell you this story for a reason. I did not get turned down that anybody knew about. I would wait until my friends had turned their backs, then I would open my big eyes and project them out, home in on a girl across the hall (they could see my eyeballs at 100 yard in the dark), and with a gesture of my head and eyes, ask her to dance. If she said no thank you, I could just nod and smile, because no one else saw me get turned down. If she gave me the yes sign, I would then say to my friends, “Hey guys, watch this. Let me show you how to get a dance.” The girl always got up and danced, and my friends never knew the difference. I became a good dancer, and it probably helped me to be a more outgoing person as my self-esteem and confidence improved.

My point is that a feature I initially thought of as a hindrance eventually became an asset. Those big eyes enabled me to ask a girl to dance from all the way across the hall without risking the embarrassment of being publicly turned down. Later in life, although many people meet me and forget my name, they will always say, “You know the guy with the big eyeballs from Vancouver, Canada.” That is positioning, that is identity, that is amplification.

As you can see, I have a lot of fun with my eyes. Learn to laugh with yourself. Most of us would worry a whole lot less about what others think of us if we knew how seldom they did! Be proud of who you are. Take the time to be kind to yourself. You are unique.

At this point, go through your worry and anxiety list and cross off the ones that fit into the 30 percent category - those that have already happened and that you cannot do anything about. Write “30 percent” alongside those items. Think about the humorous side of these issues or the positive outcomes you have had or could have from these adversities.

12% Needless Worry About Health

Twelve percent of our worries are needless worries about health. “I slept near a draft last night. I think I am catching a cold. By tomorrow my nose will be causing me a problem. By Friday it will affect my throat, and on Saturday I will have a chest cold, then Sunday I will come down with bronchial pneumonia. Maybe I should take the day off today, because Sunday is my normal day off and I do not want to have bronchial pneumonia then.”

Most of us spend far too much time worrying and complaining about needless health worries. You and I know lots of people you do not dare ask, “How are you today?” They will go on for an hour about their ailments. I do understand that there are some people who have real health problems, but for the most part our health problems are in our heads. Even when you do have a physical ailment, you can usually be grateful, especially when you meet someone with a bigger mental or physical challenge.

One of the big health worries people have is not getting enough sleep. But how much sleep do you really need? Think about it. If the neighbour’s dog keeps you up all night, you probably feel like saying, “I cannot work today, I did not sleep a wink last night - I am useless.” But if friends you have not seen in years arrive at your house at 11:00 pm at night, and you have a great time partying with them until 03:00am in the morning, chances are you will have a great day the next day because of the great time you had the night before.

Often we get ourselves caught up in needing a certain amount of sleep. If we do not get it, we get uptight and have a rotten day because of our worry and mind-set, rather than the actual lack of sleep. You do not need a lot of sleep if you have the right attitude. Just change your state of mind. (Continually getting no sleep is unhealthy.) Go back to your list and put 12 percent by those concerns that are needless worries about your health, sleep or the health of someone else.

10% Petty Miscellaneous Issues

Petty miscellaneous issues, such as who squeezed the toothpaste tube in the centre, who put the toilet paper on the roll upside down, or who took your pen, account for 10 percent of your worries. These meaningless little things become major issues in homes and in business. Do not sweat over the small stuff.

If you take that approach, it can make a big difference to your anxiety level. Cross off the petty issues from your list now.

8% Are Real Concerns

Now, if you add up the 40 percent of things that won't happen, the 30 percent that have already happened, the 12 percent of health worries, and the 10 percent of petty things, you find that a total of 92 percent of most people's worries are not worth worrying about. That leaves just 8 percent of worries that are real concerns.

4% Are Real And You Can't Change Them

Of that 8 percent, you will find that half are things you cannot change. For example, it's a real concern if we are in an economic downturn or if taxes are raising all your suppliers' costs. But you cannot change those things as far as the big picture is concerned. You may be very uptight because somebody you live with has certain personality traits that really bother you. But guess what? They are not going to change. You can either choose to deal with that person the way he or she really is, or end the relationship, but do not destroy yourself because of the way that person does things, etc. Maybe you should feel sorry for the individual instead.

Only 4 percent of your worries are real and unchangeable. You simply have to learn to live with them. What items on your list belong in this category? Cross them off and figure out how you can isolate yourself from these worries or see them in a more positive way. Read the serenity prayer. It may help.

Grant me the serenity to accept the things I cannot change, the courage to change the things I can, and the wisdom to know the difference.

4% You Can Do Something About

There is another 4 percent which is half of the real concerns that you can do something about. So, when the real things you cannot change are eliminated you are left with that 4% that is real and you can move to positive action on those issues. So in other words 4% of all worries are real ones that we can do something about.

The Energy, Time and Abilities we invest on the other 96 percent is absolutely phenomenal. In order to survive and prosper in today's sales environment it is vital that we invest these personal assets properly. The focus needs to be on the 4 percent that is real and can be affected by our efforts.

Take a moment and visualise all your assets of productive energy, time and ability in a big jug. Now see 96% of that energy being spent on things that will never happen, already happened, needless worry about health, petty miscellaneous issues and real issues you cannot change. It is now possible to see why the experts say we only use a small percentage of our brain. Only 4% of your assets may be focused on real issues.

Now change that picture and pretend that you **never** use your personal assets for the 96% but you take 100% of these assets and invest them into handling the 4% of real issues that can be affected, plus investing in creating and having a life full of health, wealth and happiness.

By really utilising the "worry chart" and understanding it completely, your business and personal life could be improved dramatically.

The point of the "worry chart" is to give you a logical method that can help you stop worrying about the things that will never happen. Get rid of the things that have already happened, avoid needless worry about health, drop the petty miscellaneous issues, and cross off the things that you cannot do anything about. Then you can focus on the real situations facing you that you can do something about. You can tackle these with extra energy now because you have dropped the rest of the energy drainers.

Now ... go to Exercise 2

Additional Actions To Reduce Stress & Worry

Following are actions that are proven to reduce stress and help you be more productive:

Set a Specific Time for Worry

Another way to tackle worries and anxiety is to consciously decide upon a worry time for the day. Then you say, "Okay, this is really bothering me, but I will write it down. I won't get into it now. I will wait until six o'clock for my worry time." That way you can sit down and do all your worrying at once.

Some people may make a "worry list" once every couple of weeks. However often you do it, after a while you will see certain worries that keep cropping up. If these worries are there continually and have not happened or are in the past, it is time to get honest with yourself. You are worrying about nothing! Laugh about it.

Move to Action

The "worry chart" is a great tool for keeping yourself in a positive mindset. It helps you to get rid of the concerns you cannot tackle and pinpoint the ones you can. Then you can go out and do something about them. This way you become mentally fit.

Even if you determine that your biggest concerns are ones that you can do nothing about, still do something. Get busy. Make some calls. Once you get out there and meet people and give of yourself, you will get productive feedback and start to feel good about who you are. You will be surprised at the people and opportunities that come your way.

If you are not enthusiastic, if you are sitting in the office or at home defeated and down, you cannot expect somebody to come banging on your door shouting "Please, come and sell me something."

The only way anything is going to happen is if you get out there in the middle of the action and talk to people. Sales are not made by waking up, looking under the bed to see if there are any potential clients there and then going back to bed.

Even if you just go meet with people that give you advice, support or take you with them during their active day, you are taking action.

Try Exercise

You can also take action by starting an exercise program - it can reduce your stress. The only caution is to move into it slowly. Build up through aerobic exercises for several months, then move on to the strength-building equipment. Over time you can change your metabolism. How much exercise? I do not mean that you should go out tomorrow and start jogging 10 miles a day and ruin your knees. But I do mean "start moving." Maybe you just want to go for a walk; that's enough to start. Maybe it's a few sit-ups. But get started at something, and the rest will follow.

Get Out Of Bed Quickly

Don't lie in bed when you wake-up. Get up and start moving, otherwise you may lie there and worry. Try not to worry in bed when with loved ones, or when eating or spending time relaxing.

Note: If you are going to lie in bed then read or listen to something uplifting.

Post Good News

Another key to staying mentally fit is avoiding the negative and actively seeking the positive. Post good news items around the house, at work, or wherever. Have fun with them and share them with other people. When somebody says to you, "Hey, things are really bad," you say, "Is that right? Just look at a couple of clippings I have here." By putting good news around, you focus on energy building and avoid seeing the world as a totally negative place.

Surround Yourself with Positive People

When most people are feeling the blues, they tend to agree with everybody they meet that life is the pits. Find a friend, somebody you can talk to who can give you positive input.

Remember that right now, while you are reading this, somewhere in your community there are people who are having the best day of their lives. There are also people out there having the worst day of their lives. Everybody is not in the pits. If you go out and search for positive news, you can find it. Do not hang out in places where people are full of negativity. Go where you feel good. If this means avoiding your banker who may be upset with you, for a few days, do it.

There are many excellent books, tapes, and seminars that can help you change your state of mind and become productive under pressure. A seminar is often useful, not only for the ideas it provides, but also for the company you meet there. A few years ago my company conducted a series of Business Owner Development Programs. Forty or fifty businesses in a community enrolled and over a period of eight to ten months they all met for a series of seminars. They also received on-site visits from an experienced business advisor plus small group networking sessions for executives to sit down and discuss real issues. Businesses that are in programs like the ones we conducted, very seldom feel the blues because they do not have a chance to stay down. If someone is down, he or she is brought up by the other people who are doing things. They have direct mentors who can assist them. (Indirect mentors are people you read or hear about.)

Make Meetings Productive With The Worry Chart

Put the "worry chart" up on the wall during meetings. When issues are brought up or people begin to get caught on things, refer to the "worry chart." In most cases the team will see if it is something that probably will not happen, it's the past, it is petty or something that the team cannot do anything about. It is a polite,

productive way to handle time, energy and ability wasters that affect management and the individuals in the meeting. Just think how productive meetings could be made by diligently using the “worry chart.”

Know The Value Of The Present

The greater majority of the worries we have are past and future oriented. The focus on the present is the key. The following statement brings this to light.

“The past is history, the future is mystery, and this moment is a gift! That is why this moment is called the present.” Lets be grateful for this present and use it wisely.

Laugh At Yourself

Learn to laugh at yourself and situations you get yourself into. The following poem may help:

*‘He was a very cautious man who never romped or played
He never smoked, he never drank, nor even kissed a maid
And when he upped and passed away insurance was denied
For since he’d never really lived
They claimed he never died.’*

Summary

By utilising the material and exercises in this module you will have:

1. Reduced Stress and Worry.
2. Learned how to use the Stress Thermometer and Worry Chart on a regular basis to help you be more productive and happy.

“That Is Good” Story

When all else fails this story with a great lesson may help.

There was a King who had a very good friend who was very wise and always gave the King good advise. One of the things that the friend used to do was every time something negative happened to the King, the friend would say: “That is good and in due time you’ll understand why it was good.”

We’ve all had this happen to us ... when we’ve had something negative happen to us and 6 months later something great happens to us ... and it could not have ever happened if the negative incident hadn’t taken place and put you on a different path to where the positive incident later occurred.

One day the King decided he wanted to go into the bush and do some hunting, so he asked his good friend if he knew of a good hunting guide. His good friend explained that he worked as a guide for several years and was happy to take the King hunting.

After about an hour in the bush, the good friend spotted some buck. He pointed them out and the King aimed his rifle and pulled the trigger and the gun back-fired and blew the King’s thumb off.

The king was on the ground screaming with pain and his good friend looked at him with a smile on his face and said to the King. “That is good. You’ve gotten your thumb blown off and in due time you’ll know why it was good.

Needless to say, the King lost it ... he was furious for his good friend for being so inconsiderate. When they got back to the Kingdom, the King took his good friend straight to a jail cell and locked him up and said to him, “Any person who would say such an inconsiderate thing to a friend with his thumb blown off is insane. You are a danger to me, a danger to yourself and a danger to the public so I’m putting you in jail for the rest of your life ... and that is good for you, and that is good for me and that is good for the public. And he left him.

A couple of years later, the King’s had had healed but he was still missing a thumb ... and he decides he’d like to go hunting. He thought of getting a hunting guide, but his previous bad experience convinced him not to. He went hunting on his own and sure enough he got lost. Not only did he get lost in the bush but he got captured by Cannibals. They took him to their village, built a fire, tied him to the stake and just as they were ready to torch him the Chief of the Village dropped by.

The Chief began to explore the King’s limbs and he found out the King had a missing thumb. Ironically it was bad luck or seen as a “bad omen” for this tribe to eat someone with a “missing limb”. The Chief said to his people, cut the ropes and chase him away from our village because he is bad luck.

Eventually the King found his way back to his Kingdom. He was ecstatic about being alive. He went straight to the jail and unlocked the jail cell and took his old friend from the cell.

He explained to his old friend how losing his thumb saved his life and he now realises that his friend was right ... it was good that he’d lost his thumb ... it saved his life. He said he was very sorry for putting his good friend in jail for 2 years and he’d like to repay him. He offered to give his good friend anything that he wished. His good friend said, “I don’t want anything from you because it was good that I was in jail.”

The King said, why do you say that? The good friend said, “If I had not have been in jail, I would’ve been with you ... and I would be dead now and eaten by cannibals because I have TWO thumbs!

I guess, what I’m really saying here is that when it comes to some things in our personal life and business life, the only way through it may be saying “that is good and in due time I’ll know why this is good.” There is usually a reason for everything, even when you lose a sale.

Following is a poem called The Final Analysis in reference to the stress we often feel in reference to our relationships with others. We’ve made a full page of it .j. ut in case you want to copy it.

THE FINAL ANALYSIS

People are often unreasonable, illogical and self-centered;

Forgive them anyway.

If you are kind, people may accuse you of selfish, ulterior motives;

Be kind anyway.

If you are successful, you will win some false friends and some true enemies;

Succeed anyway.

If you are honest and frank, people may cheat you;

Be honest and frank anyway.

What you spend years building, someone may destroy overnight;

Build anyway.

If you find serenity and happiness, they may be jealous;

Be happy anyway.

The good you do today, people will often forget tomorrow;

Do good anyway.

Give the world the best you have, and it may never be enough;

Give the world the best you've got anyway.

You see, in the final analysis, **it is all between you and God;**

It was never between you and them anyway.

Mother Teresa of Calcutta

Module 11

Capitalising On Economic Cycles And Managing Your Sales Force Part #1

Learning And Sales Development Outcomes

In this module you will:

1. Learn how to Capitalise on Economic Cycles.
2. Learn how to really put “Sizzle” into your sales meetings.
3. Receive numerous ways to hit short and long term targets.
4. Fine out how to get “pull through” with your people by them “buying-in” to what you are presenting rather than having to “push through” your ideas and find resistance.
5. Complete exercises on:
 - a) Improving your Business with “Turbulent Times” strategies.
 - b) Putting Sizzle Into Your Sales Meeting.
 - c) Hitting Short Term and Long Term Goals.
 - d) Pull Through not Push Through.

***Ntsika Enterprise Promotion Agency,
with a focus of rendering non-financial support to SMME's
is part of The Department of Trade and Industry in South Africa.
Ntsika, along with the support of The European Union
assisted in the Initial Development of the
Boosting Sales & Profits With Focus Selling program
in conjunction with Knowledge Brokers International Limited.***

Module 11 Capitalising On Economic Cycles And Managing Your Sales Force – Part #1

Capitalising On Economic Cycles

Economic Cycles are not just the economic cycles of the big economy, like the South African Economy or the World Economy. It also can be a local community economy, that of a city or province, an industry economy (like the IT Industry) or the economy of your country and even your own personal economy. Turbulent times create ups and downs in a business's economic cycles. The first part of this module is to refresh our memories as salespeople, business owners, sales managers and executives as to how "cycles" work. In business there are continual up and down cycles.

In the early 80's I left a senior management position in the broadcast industry to open my own business in Victoria on the west coast of Canada. I had owned several small businesses previously and had consulted for many business enterprises over the years. Like a lot of people starting small companies, I didn't have a lot of money, so I asked myself a question: "Where can I best use my talents and get quick results?"

We were moving into a recession. In fact, we were well into it in North America by 1982. I thought, "What do people need during a recession? They're worried about surviving." So I put together a concept for a business survival seminar. Searching for business opportunities in this way is called **capitalising on a problem**.

I ran an ad in the Sun and the Province newspapers in Vancouver, British Columbia. To my amazement there were only two responses to the ads, and not surprisingly they were both from the government. Joe McKay from the British Columbia Ministry of Small Business Development called me up to see if I was serious about doing the business survival seminar. I told him that I most certainly was serious, and I gave him a little background on my concept. He asked me if I had a workbook. "Do you need one?" I asked. He said yes. "Then I have one." He asked if I could send him a copy. "Not right now. It's at the printers," I answered. There was a silence, and then we both began to chuckle. I then told him the truth (very important). "Joe, if you need one I could have it together in seven days, but it is in my head right now." "Great. Send it over," he said. He then complimented me for the way I strung him along about the workbook and said that they needed someone with courage for this project.

This is called 'boldness', and we need it in business. There is nothing wrong with going after a project that you are not completely ready to handle as long as you have the resources to pull it together once you get the job. My philosophy is "If not I, who? If not now, when? **If not this way, what way?**"

If I don't take the job, someone else who is not really qualified will probably get it. I'm sure this has happened to you: someone who is less qualified but happens to be a bit more self-assured has moved past you and gotten the job. In turbulent and changing times we need boldness.

Understanding Economic Cycles

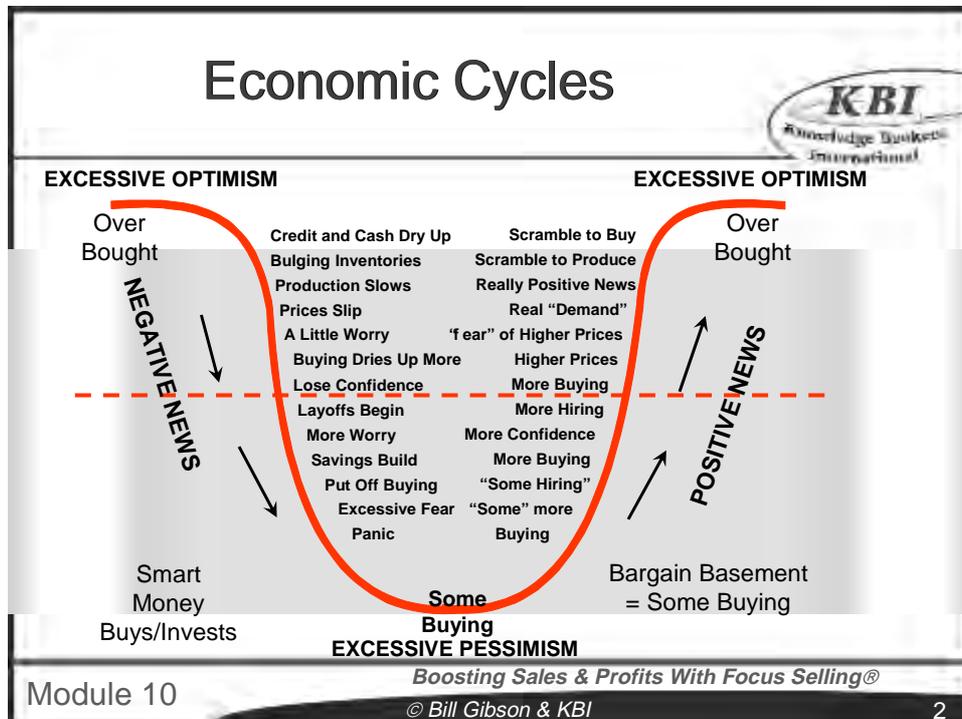
When Joe saw the workbook he hired me to go to Port Alberni to speak. At the time, Port Alberni was basically a none-industry (forestry) town with an unemployment rate of over 40 percent. The B.C. Ministry of Small Business Development had talked to several other consultants, but none of them wanted to go to Port Alberni to give a survival seminar. I definitely needed the money – and anyway, I'd never spent anytime in Port Alberni. Besides, who would be better qualified for this job than someone who grew up in a small, one-industry community in Atlantic Canada where economic ups and downs were common?

Even though my heritage made me tough enough for the job, I decided that **I'd be tougher if I had a friend to support me** on this challenging assignment. In business **it is important to enlist help when facing tough circumstances**. So I contacted Neil Godin, a friend who had brainstormed the seminar concept with me. The two of us, armed with nothing but a stack of information and the little workbook we had put together, went to conduct a session called Business Survival with the community of Port Alberni. Fifty people showed up.

Later, Neil and I discovered that more people would have attended if the session had not been titled Business Survival. Who wants to be seen at a business survival seminar? In other communities we changed the title to How to Boost Your Business in Any Economy. Then we packed the house.

In Port Alberni, our strategy (besides delivering dozens of innovative inexpensive ways to boost sales and survive) was to **explain how economic cycles work**. **If you understand something, you feel a lot better about it**. The reason so many of us get uptight about bad times is that we don't understand what is going on. If you understand the basic economic cycles, then you are better able to react to a downward swing. And if you understand how the general economic climate affects your business – as well as how it *doesn't* – then you'll be better equipped for **riding the waves of even the stormiest economies**. The good news for the folks in Port Alberni was that **they were at the bottom – and there was nowhere to go but up**.

That night, Neil and I delivered lots of down-to-earth, easy-to-use materials to the people of Port Alberni. We also provided lots of business-related skits to add humour so the participants could relax, enjoy, and absorb. One of the things I told them that night, and still tell people today, is **'if you own a business, you should laugh a lot – because some years the only thing that you may get from your business is a good laugh.** "I'm sure you can appreciate the truth in this statement.



Let's begin by considering what Neil and I had to say about economic cycles and how it still applies to everyone today. **At the top of the economic cycle, our society is overbought.** This means that people have bought and spent at a very high rate. **If the newspapers state that the ratio of consumer debt to income is going higher and higher, that's a good sign of an overbought society.** (Every business should have an ongoing file of newspaper and magazine clippings that track the economy. The file should include consumer debt ratios, interest rates, changing banking philosophies, and the like. This way you can watch the signs of the times. **If you are approaching the top of the economic cycle, put cash aside for tight times so you can take advantage of opportunities on the downswing. In a down economy, cash is king.**

When our society is overbought, we reach a point where people won't, can't, or don't need to buy anymore.

Business purchases work the same way. We get one cellular phone, and then we decide we need two. We buy a new photocopier, then new computers, and we keep adding and adding. Businesses everywhere are adding, and the business equipment companies are having a boom. But somewhere along the line it has to stop, and usually at this point the **financial institutions** help you and me stop spending – **they cut us off!**

Suddenly, we reach a point where business and consumers don't need to spend money on anything new, and **the economy begins to slow. People are in debt** and the banks are starting to look at their loans and cut down credit limits. We've seen the results in countries where credit **slows down** and **cash** begins to dry up.

If you're in business, **you have probably been producing at your peak**, perhaps even expanding to **keep up with the fast market. Suddenly, the market's not there, and you have to slow down production.** This leads to **bulging inventories.** By *inventory*, in this context, I don't just mean automobiles sitting out in a parking lot or widgets in a warehouse; **if you're in the service business, your inventory is your people.** If you've been hiring lots of people to keep up with all the business, then once things begin to slow down, you've got people that you don't need – **bulging inventories.** People who've been around for a while have seen this before. They think, "Oh, oh! This looks familiar, we'd better move out some of this inventory." **So prices begin to slip to help move the inventory, wages get cut, or people get laid off.**

At this point the news media become a factor in the economic cycle. **Negative news begins to appear** on the television, on the radio, and in the newspapers. It's something to grab on to. Now that the boom is old news, on the television, on the radio, and in the newspapers, **they grab on to the bad news, accentuate**

it, and milk it for all they can. **Negative news sells.** (If someone is unhappy with your service, they tell eleven people, but if they are happy they only tell three.)

Because of this initial negative news, **a little worry sets in, buying dries up a bit more, and we get more negative news.** Business and consumers start to lose confidence. **Government loses confidence. Labour loses confidence. Once confidence is gone, layoffs begin. A little more worry, a few more layoffs.**

In the meantime, **however, savings begin to build.** During all economic downturns there is in the average person's savings account record breaking amounts. The fact is that during a recession or an industry slow down, **there is not a whole lot less money around – just a whole lot less confidence.** Savings build.

In such a fearful atmosphere, **the money doesn't spin, which means the money doesn't generate as much additional financial activity as it would in times of optimism.** When the money stops spinning, the economy really slows down. During slow times or times when people lose confidence, a rand might spin only a couple of times. This has a real impact. A lot less money is being spent even though there is just as much net money around.

As **the slowdown continues,** you get **even more negative news** in the media. **It may start to look like the economy is going to fall apart, so we really put the brakes on money.** People are afraid, and the results of that fear is **usually panic.** (Remember, though, that because people are buying less, savings continue to build.)

When an entire country is ready to panic, **people begin selling at huge discounts and cutting the meat instead of the fat.** Everybody is bailing out because they're not sure what to do. **People's minds are scrambled;** they are not really organised. **We have hit the bottom of the economic cycle,** and you can tell this by the **excessively pessimistic atmosphere.** When everybody is bailing out, **start buying and marketing because the economy is ready to go up.** **The best time to gain market share is at the bottom, when your competitors are immobilised by negative news or have gone out of business.**

Wouldn't you rather compete with a tennis player, wrestler, or gymnast who is depressed and has not worked out for a long time? If you are in top shape at the bottom of the economy, you've got the edge.

When you are at the top of the economic cycle, everybody is excessively optimistic. When you hear comments such as "There is no way that you can lose in real estate."; "Buy now – this thing is going to double in the next two years."; "Hey, get in on the action in the stock market."; "This is the greatest country in the world with all this money coming in from other countries.", you know that we are probably at the top. Batten down the hatches and move with realism. When you hear comments such as **"Is there really a bottom. How far down can we go?" You then know you are close to the bottom.**

Frequently at my seminars I ask, "How many people have gone into business in the last seven years?" Usually at least 60 or 70 percent of the people in the audience raise their hands. They are fairly new in business and have probably never experienced an economic cycle as an owner. They get caught by surprise. But those who have been around for a while recognise the signs. As soon as it gets to the bottom, we say, **"It's low enough. Let's go out and make some good investments. Let's start hiring the good people who are available. Let's grab the market share.**

The news media start with a few small positive stories, which prompt a few more people to gain confidence and begin spending. This is the **beginning of the turnaround. A little more buying kicks in,** than a **little more positive news,** and then a **little more confidence.** People begin to think, "My gosh, this looks like it's for real – let's get in on it." **People invest, they put energy into projects, there is a little more buying,** and soon **prices start to rise.** There is a **fear of higher prices, which really starts to move the market on the upswing. That's really positive news.**

Then comes a **period of real demand, a scramble to produce, a scramble to buy – and then over the top we go again. History repeats itself.**

South Africans can trace their own down economies. It usually comes every few years. It is amazing that, given the cyclical nature of this process, people always panic when an economy heads downward. Experience, as well as logic, has shown that the trend is never permanent but instead is part of a natural cycle of our economies. The bottoms of the economy usually happen every five to eight years. You can almost set you clock by the market cycles bottoms.

Taking Charge Of Your Own Economy

You can have similar economic cycles in your own business. When, in your own operation, **everybody is excessively optimistic about everything** – saying "Go for the gusto" and "This thing will never stop" – you may need a note of caution. **You could be spending too much money and energy and may find yourself in a tight spot when you reach the end of your own boom.** Look around carefully – there may be some problems you've been ignoring. On the other hand, **if things look excessively pessimistic, you are probably at the bottom of a swing.** You should be going back up soon.

Many people experience a personal boom economy when the big economy is at the bottom and have a bust when the big economy is booming. That explains why there are still bankruptcies at the top of an economic cycle.

Once you realise that no economy, large or small, ever stays down, you can actually find many ways to benefit from the downswings. The key is to take charge of your own economy.

Don't worry about all the events around you – you can't do anything about them. **The question is: What can you do about yourself and your situation?**

Don't be scared by statistics. However low the economy sinks, remember that **you can't average one**. Although your position is part of the economic average, *you cannot be controlled by the average in any way, because you are just one*. Think about it. If your industry is down 30 percent. It probably means that some people are down 65 or 70 percent and some people are up 5 or 10 percent. That's how you get an average of minus 30. So make sure *yours* is the company that's up. An average is the best of the worst and the worst of the best. Who wants to be average? Whatever the average, be the part that's at the top, pulling the average up; that's the goal for running a business in turbulent times.

In business we are faced with so much change that even if the economy happens to be strong, many of us will still experience turbulent times. Many of us relate to the economy, as it is a primary consideration for most businesses. However, the trick to riding the waves – in fact, to staying afloat at all – is learning to utilise all your resources in order to react to the continual changes that we are all faced with. A fast-growing company has turbulent times in the areas of systems, people handling, and financing. **Less worry and less energy spent chatting about circumstances beyond our control will automatically make us better off at any time.**

Following is a list of seven ways to help you continually ride the waves of turbulent and changing times.

1. Post the history of economic bottoms on the wall where you can see it. You may take it from this chapter or create your own. You might also want to create a chart or some other representation of the information presented earlier in this chapter about economic cycles.
2. Start your own economic indicators file as suggested earlier in the chapter. This should include data such as unemployment statistics, interest rates, corporate profits, consumer spending, consumer debt, new home starts, real estate sales, and automobile sales.
3. Review the file and the charts whenever you are making major decisions and / or doing a quarterly review. This is vital information for planning and decision making. Economic indicators may signify we are at the top of the economic cycle. If this is the case, you should wait for the bottom before you expand. Labour will be less expensive, real estate will be cheaper, and interest rates may be lower. A study of this information can tell you when to borrow, when to accumulate cash, when to raise or lower prices, when to recruit people, and when to get aggressive in your marketing. There will be excellent examples throughout this book that show the possibilities when using this information.
4. Relate excessive optimism (the top) and excessive pessimism (the bottom) not only to the economy, but to yourself, your customers, and your company. There is a big difference between being confident with a positive outlook, and being excessively optimistic. All individuals, departments, companies, and countries have energies that ebb and flow.
5. Make a habit of finding a minimum of three opportunities arising from any situation or circumstance that is news today. I am not suggesting that you prey on other people's misfortunes, but I am suggesting that there are several ways to view situations and circumstances. If you make a habit of looking for opportunities in public issues, you will quickly see how to capitalise on your own misfortunes, changes and turbulent times.
6. If you are near the bottom of the economy (whether going in or out), pull your team together and visualise how immobilised and down your competitors are. Then search for the business opportunity that is being created, and brainstorm all the things you and your team can do to be more productive.
7. Look at change in a positive way. We all know someone in their late sixties, seventies, or eighties who looks as if they are ten to fifteen years younger than they really are. These people are always out participating in new adventures and activities uncommon to their age group. In my opinion, these people have found the fountain of youth. They are not afraid to venture through that awkward growth stage of learning something new. It is much easier to stay secure with the old (an illusion) than to feel awkward, slow, embarrassed, and inadequate while trying the new. However, when you begin to master that new venture, there is a great surge of energy, and that creates spirit. Look into the eyes of these active elderly people. You see spirit. They are always learning and progressing.

Individuals, departments, companies, communities, and countries which are willing to accept and tackle change with a vengeance have spirit.

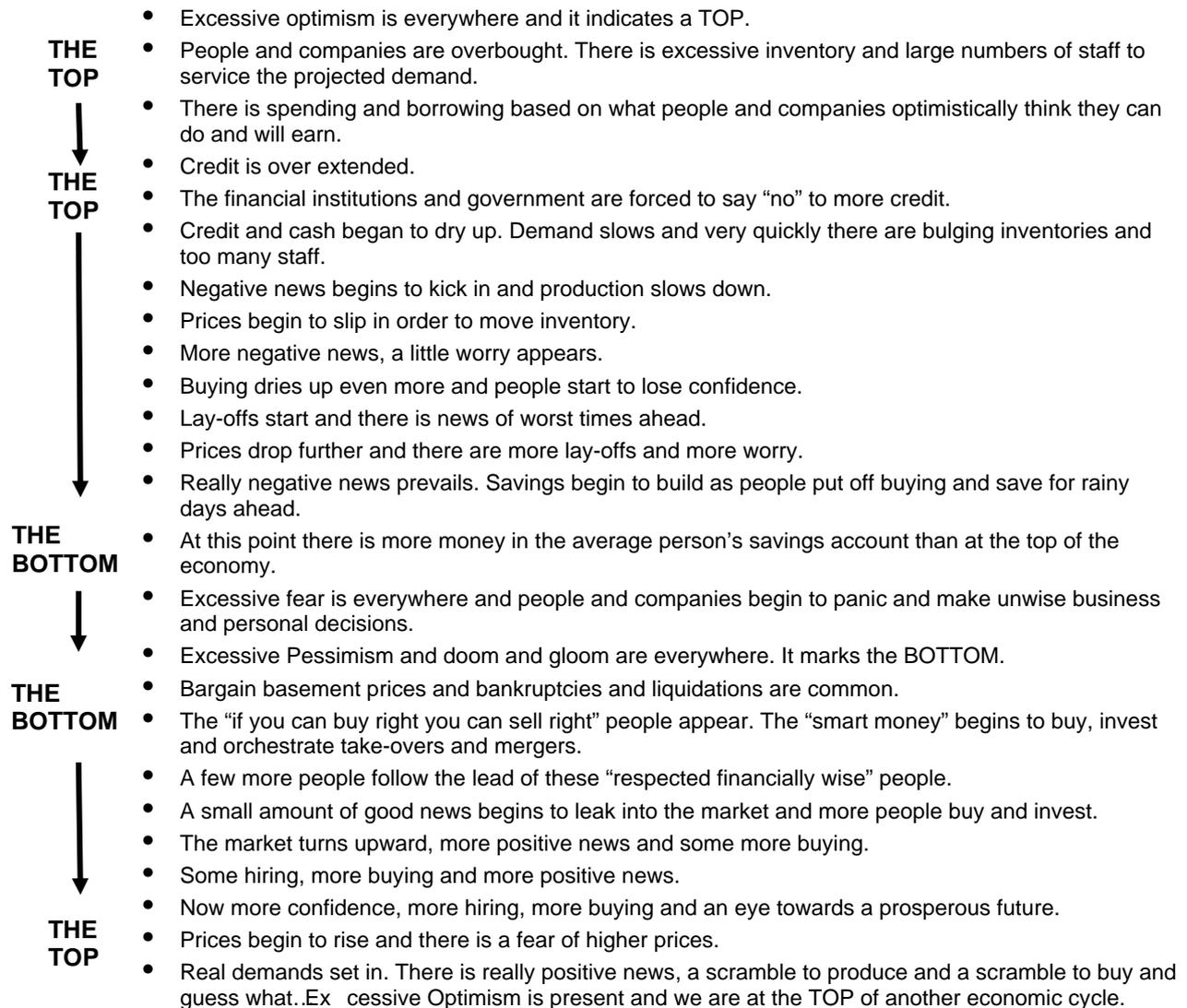
Change gives you an opportunity for developing spirit. Turbulent times are changing times – so grab the opportunity to infuse a new energy into yourself and others around you. If you do this, you are well on the way to successfully riding the waves of any turbulent time or situation.

Look at how you can maximise your opportunities at all times. Be ready to change!

Questions To Ask Yourself:

- Is there another way to look at this problematic situation? If yes, how?
- Who is affected by this problem and how can I create a positive opportunity by helping to solve it?
- Have I or someone I know been in this situation before?
- How did I or someone else solve the problem in the past?
- Regardless of what is happening, what is most important to me right now and what must I do to obtain it?

Economic Ups & Downs Review



Gaining Market Share In Down Times

The best time to gain market share is towards the bottom of an economic cycle. Why? Most of your competitors are negative, depressed, withdrawn, unsure and often panic stricken. It is easier to outperform them when they think, feel and act like that.

Following are a few suggestions of what can be done during down economies, personal sales slumps or in tight times in your business.

- Get lean, trim the fat and be keen.
- Target the right type of clients.
- Double your number of calls per day and increase your frequency on key clients and key target groups.
- Train, train, train – read books, listen to tapes and attend seminars to improve both your skills and attitude.
- Get physically fit and do things that improve your energy level.
- Work longer hours than the competition.
- Surround yourself with positive, upbeat, stimulating and successful people.
- Be pro-active with super service, innovative ideas and real solutions for your customers.
- Above all, project a positive outlook and be active with a powerful “be seen” personal marketing programme.



Remember:

The economic cycles do not only pertain to countries, cities and regions. The cycles apply to companies, divisions, departments, families, individuals and even sports teams and individual athletes. Your personal economy can be “booming” while your country’s or company’s economy is going down. Take control of your own Personal Economy! You can do it.

Exercise 1:

The suggestions made in reference to what you can do personally to Gain Market Share in Down Times are great ideas to implement at any time. Choose three of these suggestions and describe the actions you will take to improve those areas.

Suggestion / Idea	Actions You Will Implement

Managing Your Sales Force – Part 1

When we work in companies and we see some sales teams really performing and we see others not performing, there is always one factor that is present. If a team is really flying, it is because of the sales manager's ability to lead, develop and inspire his or her people. If the team isn't performing it is usually due to the sales manager's lack of ability or desire to lead, develop and inspire his or her people. The balance of this module is devoted to helping you manage and lead your sales force more effectively. Many of the ideas will work for non-sales managers with their team as well.

We will focus on:

- Putting "Sizzle" Into Your Sales Meeting.
- Hitting Short Term and Long term Targets.
- Getting Pull Through Not Push Through.

Let's start with Putting "Sizzle" Into Your Sales Meeting.

Putting "Sizzle" Into Your Sales Meeting

The most important thing about a sales meeting is to ensure that everyone walks away feeling that something valuable has come out of it. If people feel it was a waste of time they won't be very enthusiastic about attending the next meeting.

Years ago, I sold radio advertising on the East Coast of Canada for two radio stations, CJCH Radio and C100Fm in Halifax, Nova Scotia. I was a top producer but I had a poor habit of showing up at sales meetings late. The sales manager, Chuck Langdon used to get very annoyed with me.

One day I arrived late for a meeting and Chuck let me know how annoyed he was with me. He did it in front of the other members of the team. I retaliated with a comment that "If his meetings were more interesting I might arrive on time." He then replied with, "Gibson, if you are so bright, why don't you run next weeks meeting?" I said I would be glad to. He told me to sit down and be quiet but after the meeting he called me into his office.

I apologised for my comments and Chuck accepted my apology but he explained to me that he was "bored at his own meetings" and that it is difficult to make a weekly meeting interesting each week. He then suggested that I run the majority of next weeks meeting as a follow through to the challenge he threw at me in the meeting. If it worked, every second week one of the salespeople would plan and facilitate the majority of the meeting. (Chuck would cover a few things that had to be discussed as a sales manager.)

When my meeting day came, I was at the office at 7:15am getting ready for the 8:00am meeting.

At 8:15am, no one had shown up. From 8:15am to 8:30am the 7 salespeople slowly trickled in and Chuck was the last to arrive. It threw off my meeting in the beginning. We all had a good "laugh" because I experienced what it did to the person in charge of the meeting if people arrive late. The meeting was a success, and to this day every second meeting is run by a salesperson.

The point is, we have all been in meetings where we have thought "What a waste of time! I could actually be somewhere else getting some valuable work done." To try and keep your meetings exciting and productive week after week is almost an impossible task. This section of this module looks at ways you can actually make your meetings exciting and productive. The following suggestions will help you achieve that goal. The first one relates to the "Chuck Langdon" story.

- **Rotate Who is in Charge**

"Treat me as if I already am, and I will become that." This statement holds true with this concept. Every second week have a different salesperson take charge of the sales meeting. As the sales manager you may cover a few key issues and then turn it over to the salesperson or to two people if necessary. When the meeting is over, obtain the individual(s) feedback on how the meeting went before you start telling them. Ask the following:

1. What went well?
2. Where could you have improved?
3. What potential problems, hurdles or challenges did you see for the future?
4. What opportunities do you see for the future?

Remember, this is a tried and proven concept that dozens of sales managers in South Africa are now using since hearing the Chuck Langdon story.

- **Unique and Different Venues**

Some people have several different routes they use for driving to work. This approach to living breaks the monotony or automatic pilot syndrome. The same applies with meetings. It is a known fact that a change of environment can change a state of mind. Think of the times you have not felt that great and you have gone for a walk and felt totally different one hour later. This is the same concept. Have a brainstorm session with your staff to explore unique and different venues. This suggestion does not mean that you don't accomplish what you normally do in a sales meeting. You are there to get the job done but enjoy the venue. Following are some different venue suggestions for meetings:

- On someone's boat parked in the harbour.
- At someone's home and have breakfast at the same time
- At a restaurant or hotel in a unique place. E.g. a ride up a gondola to the restaurant at the top of a mountain.
- A meeting in a passenger train (moving or parked).

- In a cabin at the lake.
- At a go-cart track (tie in racing)
- At an upscale pool hall - include pool
- At a swimming pool
- In the 'Sports Box' - 2 hours before the game
- In a recreation vehicle or caravan
- Weather permitting
 - on the beach
 - at the park
 - in the woods
 - on the mountain
- On a ranch, farm, game reserve, etc.

Think about it. What if once a month you had a unique and different venue for your meetings? It would show your salespeople that you care. Word would get out and your style of management would be seen as innovative and unique. These things attract good salespeople plus they impress the clients as well. You could have a competition for the year in reference to the salesperson that runs the most unique meeting. Set up criteria for grading the meeting. A portion of some of the meetings or immediately after the meeting could be set aside for entertaining key clients or support staff and other departments at the unique venue.

- **Music / Banners / Decoration / Hats / Refreshments / Skits**

When we attend conferences and celebrations we often participate in wearing hats and t-shirts. We play upbeat music, create theme songs, put up banners with positive sayings and Vision Statements on them, have refreshments and even have the teams and individuals put on "skits" to demonstrate important points.

I just spoke for Eric Brown, Director of Sales Support for Standard Bank in S.A. He had a team of his executives together. He developed a theme song around the theme ROCK. His team was really Rocking. They decided that ROCK meant the following:

R - Reflect
O - Observe
C - Collaborate
K - Kick Ass

Eric is a master at creating an atmosphere at a meeting.

Consider a theme song for your team and play it at the start of each meeting. When you hit budget, bring some hats, horns, decorations, refreshments and have some fun at the meeting.

When you are introducing a new product or you want to reinforce a point, have a couple of your people do a "skit" to make the point. You could even bring in a couple of amateur actors or actresses as a surprise. The possibilities are unlimited with a little bit of creativity and extra effort. Do it!

- **Sales People Visit Other Sales Meetings**

As a business owner or sales manager you have many associates who conduct sales meetings. Convince them to allow one of your sales people to attend one of their meetings and be willing to reciprocate. Then have that person come back with the ideas they picked up. It is important they only bring back the positives unless it is something that is also done in your meetings and they use the example to help eliminate or reduce the problem in your meetings. Remember, a team member coming back with his or her observations and suggestions is much more powerful than you suggesting it as a manager or owner.

- **One "Quick Tool" Per Meeting**

At every meeting start a tradition of focusing on "one good sales tool" or "skill of the week". That way you are continually reinforcing winning principles.

- **I "Shopped The Competition" Report**

Barry Gunn, owner of Digger's Road House who was a small business attending one of my 10 Month Business Owner Development Programs devised an unique way to improve service, acquire staff involvement and evaluate the competition.

Once a month, four staff members were asked to select a competitive restaurant from a list, and go out to dinner – compliments of Digger's, of course.

The next day, before opening, Digger's staff meets, and the four staff members who had "Dinner Duty" for the month, report on their night out to the rest of the staff. The only restriction - The diners can make positive comments only – they report just on the good things the competitor is doing. Exceptions are granted only if the staff notices something amiss that Digger's is also doing. Discussion on those points then centres on making a correction to Digger's service.

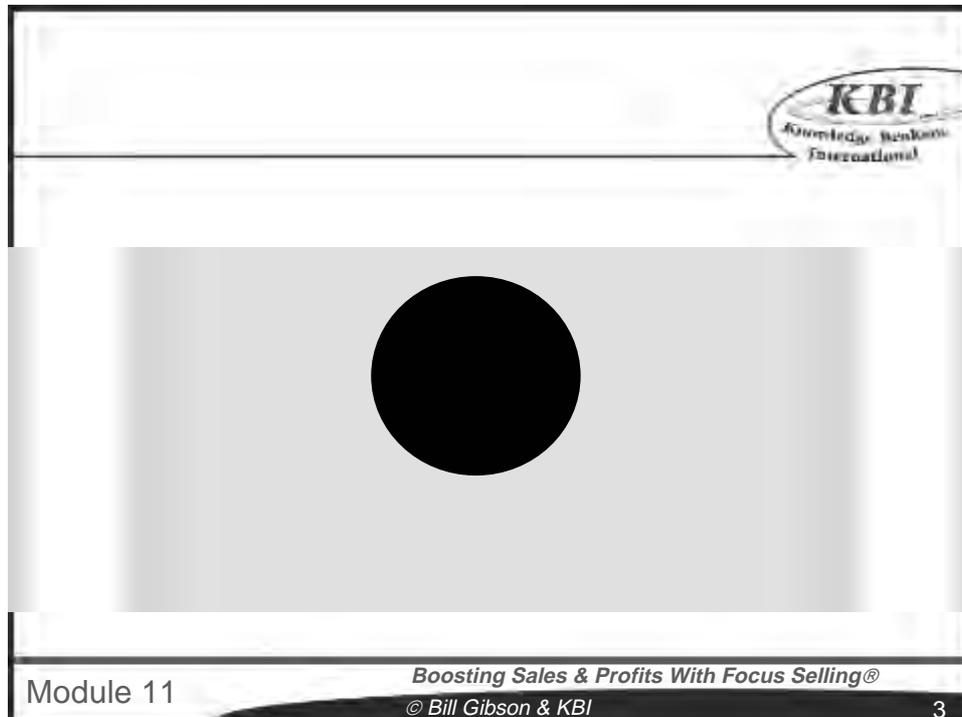
Every 60 days you could have a couple of your people "shop the competition" "in person or on the telephone" and give the team feedback and make suggestions how your team can take advantage of that information.

- **We Were Shopped Report**

Consider once a quarter, having someone "shop your business and your team" and give feedback. You could in advance agree with the team what would qualify as good service or what skilfully handling

enquiries looks like. You could set up incentives based on the results. It could be an incentive that is shared by the team but it is based on the results of one person being shopped. If the person doesn't make the grade ... no incentive for the team. If he or she does ... the team gets the incentive. No one wants to let the team down and most people would like to be the Hero of the Day.

- **Utilise And Make A Poster Of The Dot**



When most people look at the above slide, they see a Dot. What is really there is a Dot with a whole lot of white space! In life and business we usually get focused on the Dot instead of the white space.

We get focused on something we don't like about another individual or the company and as time goes on it gets bigger and bigger and we blow it out of proportion wasting time, energy and ability. The Dot is looking at why something won't work instead of all the ways we can make it work. It is continually "harping on" something that happened in the past instead of focusing on what needs to be done now or in the future. It is taking something that is a small issue and turning it into a big issue.

What we are suggesting is make a poster of the Dot and put it up where it can be seen. Explain the meaning to your people and then ask the team to refer to it in meetings when someone focuses on the Dot. It can help things stay on track.

- **Have A Client / Customer Join You**

Have a client or customer come to the meeting and explain his / her likes, dislikes and the opportunities that he / she sees:

- **Invite A Professional**

Invite people to speak at your meeting that can add value to the team members. Those professionals could be technical people explaining technology, could be a computer wizard showing ways to use the computer or certain software programs more effectively or even a P.A. on getting organised, or another salesperson on writing proposals. They could come from within your organisation, from related industries and from other industries.

- **Invite A Value Added Guest**

You could invite value added Guests such as tax specialists, a Psychologist, or a stress management counsellor. Make a list with your staff of who *they* would like to see as guest speakers, presenters or just someone who will answer questions at the meeting. Focus on local business people, celebrities, etc. who will not charge for their service. This could include in-company executives or even a service manager from a car dealership who tells how to look after your car.

You may want to have selection criteria divided up into Absolute, Beneficial and Convenient. Criteria could include:

Someone known for their expertise

- Proven financial success
- Public or industry recognition or status
- A person who has an inspirational story.

It could include a Supplier

Have the team decide on which suppliers they would like presentations from and what they would like to achieve during the presentation. Upon inviting the suppliers, let them know what you expect and how you would like them to present. Tell them what the ultimate presentation would include, e.g.

- Info that can be used immediately
- What it means to the customer (features and benefits)
- A specific length
- Being prepared to answer specific questions that day.

Quiz Question Period / Product Analysis

Have the sales staff take a product or service and do an analysis at the meeting. Set some objectives. In other words, what are advantages and disadvantages in reference to the competition? What are the features and benefits to the customers? What are the possible hurdles and challenges as well as the opportunities? You could even ask them to prepare in advance.

Once a month you could have a quiz. Build in incentives for the level of knowledge, etc. The quiz could be focused on:

1. Customer knowledge
 - demographic
 - geographic
 - psychographics
 - types of business
 2. Product / Service / Concept Knowledge
 - features / benefits
 - usage
 - results
 - market position
 3. Company knowledge
 4. Industry knowledge
 5. Sales skills knowledge
 6. A value, an objection, a strategy, a tactic
- The list is endless.

• Did You Know On This Day Of The Year

Start a tradition. Open every meeting with Did You Know That On This Date ... In 1982 The Following Happened. It becomes something the members look forward to. It could be "can you tell me what happened that was significant on this date in 1947?" ... "Paul McCartney was born."

• Opportunities With Upcoming VIP Events

To make sure that the team is taking full advantage of upcoming events review where the opportunities are. They come in the form of:

- Business Shows / Conferences / Exhibitions.
- Sports Events / Entertainment Events.
- Utilising Sports Boxes / Premiers etc.

Set up an events board and rotate the responsibility to keep it full three months in advance.



Sample Events Board & Functions

Upcoming Events & Functions

Month: May	Month: June	Month: July	Month: August

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- **Special Days / Weeks / Months**

Also review all special days, special weeks and special months coming up. That could include secretary's week, client's birthdays, client's business anniversary, Valentines Day, Christmas Day, St Patrick's Day – Irish, Robbie Burns's day –S cottish, and Cultural & Religious days and weeks. It also could include Left Handed Peoples Day, People Under 5 feet, Cats Day, Dogs Day etc. It doesn't have to be all serious. Set up a Special Days, Weeks, Months board and utilise it just like the Events & Functions Board.

Sample: Special Days / Weeks / Months Board / Template

Upcoming special days / weeks / months

Month: May	Month: June	Month: July	Month: August

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Sometimes we are too serious. Here are two success stories from two normally conservative medical sales representatives from the Cape Milner Region, S.A. of Adcock Ingram.

- St Patrick's Day I dressed up in Green and went on about 20 calls armed with Guinness, Clovers and other paraphernalia. My objective was to show my clients another side of me. It went down very well, and I have found that my relationships have fast tracked.
- April Fools Day. I have never played a prank on anyone, but I thought why not dress up as a patient and see if I can fool the doctors. They are all developed "A's" most of whom I have been calling on for six years. Booked in as Johannes, Jacobus, Stephanus .. I had a serious Afrikaans accent. "I are from the farm .. sitting on the tractor .. I winged it completely and I was totally out of my comfort zone. I fooled about nine or ten guys. It has fast tracked my relationship with them, they check the book and know when I am coming and they look forward to my visits. I must say I enjoy them as well. (He actually had one Doctor do a complete eye examination ... and finally he had to let the Doctor know who he really was. The Doctor was very impressed, had a good laugh and the relationship is even stronger than it was.

- **Useful Information – Articles and Books**

Review useful information from articles and books. Consider having everyone read a certain article or a chapter of a book and come with answers to certain questions. That way you have everyone on "the same page". It reinforces learning if everyone is learning the same thing at a time.

- **Start With Audio Or Video Tape Presentation**

One viewing of a sales motivation or management videotape will not "do the job" in reference to memory. Apparently 80% of the information picked up at a "live" presentation is gone within 48 hours, so only by viewing or listening to the same tape several times does one really start absorbing the material. Utilise videotapes from training programs to start a meeting. You don't need to view the entire tape. You may only view 10 minutes. You could also utilise audio portions of the Business Success Series. Develop a library of audio and video tapes and set up a strategy every 6 months. You could even have a salesperson run that portion of the meeting. The person would view or listen to the tape in advance, prepare a review and facilitate questions and action plans. The video could also be a "clip from a movie" that makes a point or of a comedian.

- **Utilise Directive Questioning And Feedback**

Review Directive Questionnaire in Module 6 –A pproaching and Uncovering Client Needs.

E.g.: "What did you see here that was of value?"

"Tell me two ways you can sell this to a client!"

- **Brainstorm Important Topics**

Brainstorm with the team the topics and issues they would like to see covered in the next 90 day set of meetings. Prioritise them.

- **"Boasting Sessions/Gripe Sessions"/ Success Stories**

a) Boasting Session / Success Stories

Once every two months have a "Boasting Session". This is where the salesperson is encouraged to share the details of something exceptional he/she did in reference to sales, service and/or teamwork. Have an award for the top story. This could be the entire meeting or part of a meeting once a month. You could have a "Success Stories" competition. Also, have a session on "It didn't work stories". We learn from our mistakes as well.

b) Gripe Session

Over time, in any sales department, because of changes in the economy, changes in the product, company, rules, etc. gripes will build up. These gripes can be disruptive in a sales meeting where you have limited time. Every once in a while set aside one of your meetings to hear the gripes, concerns and dissatisfactions of your sales force. There are a few basic principles to follow that can make the meeting successful.

- 1) Agree with your team that none of the issues are to be dealt with until all the issues are on the table.
- 2) Don't be defensive, attack or justify as the issues are being presented.
- 3) Set aside your opinion and put yourself in the other person's shoes. Try and see his/her perception, background and/or circumstances.
- 4) When reviewing the gripes, ask for their opinions and solutions.
- 5) Treat the session as a team project. Submit your own gripes in reference to the team, other departments or your own workload. By doing this you are part of what is happening.
- 6) Let everyone know that this meeting is "safe territory". The purpose of the meeting is to get everything on the table. Review the above points that could apply to all members of the team.
- 7) Facilitate the meeting and have someone else be the recorder. Record what's being said in a way that it is visual to everyone.

- **Team Code Of Commitment For Meetings**

Brainstorm a "Team Code Of Commitment For Meetings". This could be 10 Rules and Principles for running the meetings. Post it on the wall so any member can refer to it to keep the meeting on track.



- **Talking Stick / Listening Feather**

Have an official talking stick and use it like Native Cultures do. Only the person with the stick talks. Look at the time wasted with people all trying to talk at once! In the tribal meetings of the North American Native Culture, those at the meeting were not to repeat the same thing said by others. They were to listen carefully and give valuable input. A tool like this and the history behind it could make the meeting interesting. On the day you introduce the concept, you may want to go to a costume shop and rent a traditional chiefs headdress of feathers, etc. The Listening Feathers is given to the person specifically being spoken to.

- **Worry Chart and the Dot**

Module 19

The Worry Chart

40% Of All Things We Worry About Never Happen

30% Have Already Happened and We can't Do Anything About Them

12% Needless Worry About Health

10% Petty Miscellaneous Issues

8% Real Worries. ½ We Can Do Little About, the Other ½ We Can

Take Positive Action Now

The Complete Sales Action System ©

Have this displayed at all times in your meeting room. When the team or an individual gets caught up on issues, encourage staff to utilise the chart to see if it is worthwhile putting those valuable assets of time/energy/ability into the subject. This one tool used properly could in fact dramatically improve the productive output of your meetings, yourself and your salespeople. You could play the audio tape or audio CD from Module 10 that describes the Worry Chart and how to use it.

Final Comments

Any one of these ideas will not make a big difference, but if over a 90 day period you were to add several of these ideas to your meetings, you will see a big positive change in the participation and interest level of your team.

Exercise 2:

Pick out 10 of these ideas to put Sizzle into your meeting and set a goal for implementation.

“Sizzle” Ideas	Target Date	Date Completed
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		
10.		

Hitting Short And Long Term Goals

You can't run a business on just short term goals and you can't run a business on just long term goals either. You need a combination of both. Following are a series of ideas that can assist you with "Hitting Short Term and Long term Goals."

- **Pipeline Performance – Activities Completed**

The amount of business you have in the Sales Pipeline can tell you what your success will be in the coming weeks and months. You also know that certain activities like a needs analysis, a written proposal, presented to the key decision maker, presented to those who are influencers, knowing the buyer's actual buying process help indicate your chances of success. Set up certain incentives for activities achieved at certain points of the sales and buying cycle. It will help your people to continually think with future sales in mind as well as present day sales.

- **Long Term Focus And Incentives**

This is similar to the first one but the difference is that you make it a specific focus. It may be that you pay a special incentive if you have a certain percentage of your annual budget on the books by a certain date. It could be a certain percentage of your September budget achieved by May (Forward Selling).

- **Most Valued / Most Wanted / Most Potential Action Plan**

Implement and closely monitor the Multiple Level Most Valued / Most Wanted / Most Potential Action Plan. Set up special incentives around this plan. Closely monitor it. Every 90 days update the clients and prospects who are on the lists. (Module 3 of this program)

- **Utilise Criteria To Ensure Focus**

During the period Santam was putting a test group through our Sales Process, they decided that they wanted to write a certain amount of business just before Christmas with their brokers. To help with that very "short term" focus, we put together some criteria to target the right people. Following was some of the criteria:

- Brokerage Firms who owe you a favour.
- Firms where we know decision makers who make quick decisions.
- Brokerage Firms who could "Flip A Book" to us.

These kinds of criteria can produce quick results. By the way, they hit their targets.

- **Fast Start Incentives / Rewards / Trophies**

Many "sports games" are lost because the team started too slowly. "If they had played the first 20 minutes of the game the way they did the last 20 minutes, they would have won" Is a statement often made by unhappy fans. The same happens with a sales team. Set up incentives that you pay out, for example if someone achieves a certain amount by the 10th of the month. People do what they get paid for and are measured on.

- **Plenty At 20 Incentives / Rewards / Trophy**

This is the same concept, the only thing you are saying that if you achieve a certain amount by the 20th of the month you receive an incentive. Just recently a Sage Life Sales Manager came to me to say that concept has worked miracles for his sales team results. He picked the idea up from me 2 years ago when he was with another company and has been using it ever since.

- **Over The Top Incentives / Rewards / Trophy**

These are incentives based on going over the top in a month, quarter or annually. This is more common than the other two.

- **"Red Hot" Incentive Recognition**

The idea behind this one is that if you have a person who is on fire; give her a "Red Hot Incentive". It is understood that the "Red Hot Incentive" is given to remind you that you are "on a roll" or "on fire" and now's the time to really "pour on the steam". Often people back off too quickly when they are at maximum performance. Be sure that your people understand the "Red Hot" reward or incentive. It is a momentum reminder. As you know one of the keys to success is to get momentum happening and then do everything you can to keep it rolling. Luck seems to find momentum and the business comes with ease when you've got momentum.

- **One Day / One Week Contests And Promotions**

Don't make your goals and contests all long term. If you do, they lose their excitement. I've actually seen salespeople forget what the promotion, goal or incentive was if it is too long term based. Spring quick fun filled dynamic One Day and One Week Contests and Promotions on your people and make the rules simple and "pay-out" the incentives quickly. Cash is powerful. Use it if you can.

- **Breaking "3 In A Row" Comfort Zone**

We all live and work in Comfort Zones and when we happen to break the present Comfort Zone Ceiling we easily fall back into the Comfort Zone the following month. If you see someone "Break Through" their Comfort Zone, immediately set up a "3 In A Row" Comfort Zone Special Incentive. That way they stay focused and once they break that ceiling three months in a row, it becomes their New Comfort Zone.



- **Mystery Focus / Mystery Product**

Choose five products or services and write the names of them on separate sheets of paper. Let the staff know what they are and then put them in five separate blank envelopes and seal the envelopes. Now have a staff member choose one of the blank envelopes. The next step is to write mystery product / service on the envelope. Offer a “spiff” or “bonus” for each one of the mystery products / services that is sold this month. No one knows which one is the mystery item until we open the envelope at the end of the month. The staff sell all five items to back up their guess. It can be a fun incentive. I would also suggest you offer a set amount for the staff member that can guess which product is the mystery product. Allow one guess and seal the guesses in an envelope until the end of the month.

Exercise 3:

Which 5 products or services could be used in your first mystery selling contest?

- 1.
- 2.
- 3.
- 4.
- 5.

What will be the incentive?

- **Focus On The Average And Category**

Instead of all your focus on the gross sales figure you want from someone put a focus on increasing the average transaction and put an incentive behind the concept. It will automatically give you an increase.

You can also put the goals and incentives behind a specific category of products or services. That will work also.



Exercise 4:

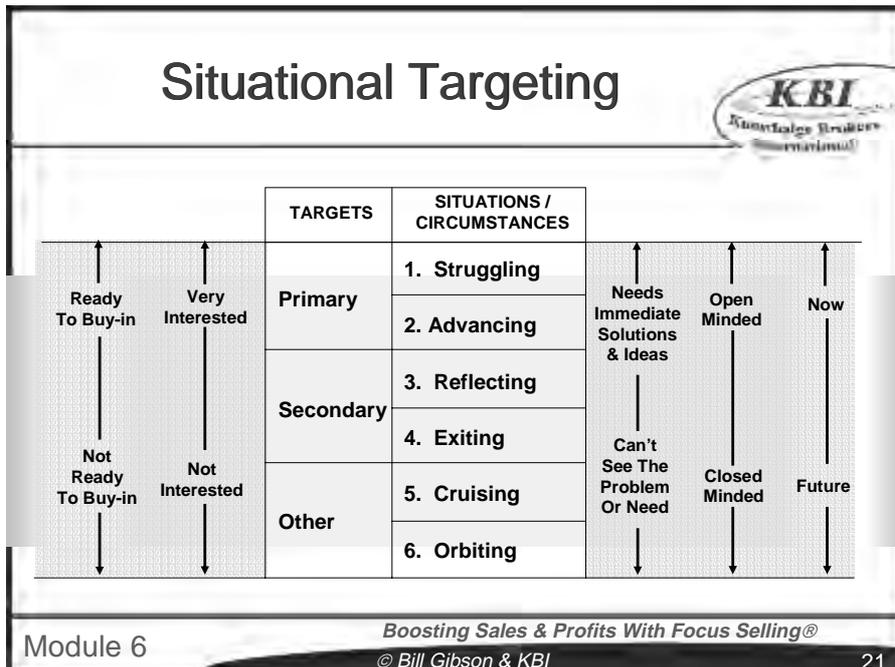
Select The Top 3 Ideas For Hitting Short and Long Term Goals and put together what the details will be and implement the idea.

Idea	Implementation Details	By When
1.		
2.		
3.		

Pull Through Not Push Through

Some of the greatest income generating ideas and morale boosting programs within companies have met a quick ending because the front line never “bought into” the idea, concept or program. Getting “buy-in” is the key when dealing with your sales team and other staff members. “Buy-in” doesn’t happen when you “Drive Something Through” the sales team or if you are using “Push Through” tactics. The key is to get Pull through not Push Through. In other words they “buy-in” and want what you are offering. Following are some tips on achieving that.

- Identify Your “Most Likely” to “Buy-in”



The Model on Situational Targeting used in Module 6 for identifying which individuals and organisations will “Buy-in” the quickest is just as effective when wanting “Buy-in” from the individuals on your team. We’ve changed the terminology slightly so you get the picture as to how you need to focus on and what to expect.

The level of a salesperson’s buy-in is definitely impacted by that person’s personal or business situation or circumstances. Following are some important points under each of the 6 types of Situations and Circumstances.

1. Struggling:

A salesperson, who is struggling, has problems, hurdles and challenges usually needs immediate solutions and ideas and they want it now. They are more open minded, will show a high level of interest and are obviously ready to buy-in to a solution that can help them. This group fits under the Primary Group. They are often your best point of entry and become your quickest allies and supporters. It is important that they recognise they have a problem or challenge.

2. Advancing:

Those that are advancing, growing and wanting more, also fit into the Primary Group. They are open to anything that can fill those industrious objectives. Again if you get these salespeople on side they will actually help sell or drive your idea, product or solution. Show them how to get ahead with your solution. They can also influence others to “buy-in”.

3. Reflecting:

Salespeople that are at a point of reflecting, contemplating or in the process of introspection are also on the upper side of being open minded, interested and quite ready to look at solutions and directions. The process of reflecting means they are analysing and looking. Reflecting fits in the Secondary group because the openness and quickness to buy-in is not quite at the level of those Struggling or Advancing.

4. Exiting:

Salespeople that are in the process of retiring, being transferred, quitting, being dismissed being promoted etc. don’t usually have as much at stake in the current situation or present department they are in. It is possible they may want to leave their mark, or make a grand exit, so they are open to a certain level of buy-in but may not be interested in championing an idea, concept or purchase. Those that are in a situation of Exiting fit into the Secondary group.

5. Cruising:

These people are on automatic pilot. Usually they have been on the job for a long time. Things are moving along quite well and they are not too eager to “rock the boat”. And “if it isn’t broken don’t fix it” philosophy prevails. It is much tougher to get their immediate buy-in or even to gain a “listening ear” from them. Those who are Cruising fit into the Other Group and are part of the least likely to buy-in group.

6. Orbiting:

This group can often be overly optimistic about their present situation and abilities. They can be arrogant and “cock-sure” and literally be closed minded to your solutions. It is tough for them to want to look at solutions when they can’t even see the problem. Those that are Cruising or Orbiting are not usually the first people you want to focus on.

This Model helps you determine where best to put your energies and determine your strategies.

To eventually bring an Orbiting salesperson on side it may require the influence from another salesperson who is Advancing and has the credibility to get the Orbiting person to listen.

It is important to note that with Cruising and Orbiting individuals, that consistent helpful follow-up usually gets you in the door. Sooner or later their feet will hit ground.

With the Cruisers a storm will rock the boat sooner or later. It could be a new sales manager or executive who wants specific results, it may be a loss of a couple of good clients or a dramatic change in their personal life that requires them to re-charge themselves and take a different approach.

With the Orbiters you’ve got gravity on side. Sooner or later they will come down. You can’t always stay on top and be arrogant. It could be a family situation that humbles them (sometimes only for a short time), it could be health problems, changes in company policies or a new salesperson surpasses them and grabs the limelight.

With both the Cruiser and Orbiter try not to “nag them” or “alienate them”. Keep them in the picture, look for ways to support them and continue to develop the relationship. You want them to feel comfortable to turn to you when the “Cruiser’s storm hits” or The Orbiter “hits the ground”.

On trying to get Team Buy-in it is usually better to go with your main focus on the Struggling individual and the Advancing people first. Go where the “Heat” is at and get them “on fire” first and then move to those Reflecting and possibly Exiting. Once you’ve got things moving and it is working well you then have “Proof” to get the Cruiser and Orbiter moving.

• Get The “Most Likely” Or “Most Influential” To Review, Evaluate And Suggest

One of the best ways to get a team to buy into something new is to get your “Most Likely” person or “Most Influential” person(s) to review, evaluate and make suggestions in advance. That person(s) can be part of the delivery process. It adds credibility! You may even go as far as letting them present and give their suggestions.

- **Identify Opposers And Develop A Plan**

“An Opposer is someone who is against something in speech or action. They resist strongly.” An Opposer is the balance for any new idea or process. For every argument there is an opposing argument. If you've got some of your people supporting you by championing your idea or concept there is likely to be someone opposing.

- The Opposer is the balance for any proposal. For every argument there is an opposing argument. If someone is supporting you by championing you and your product, then it is most likely that someone will be opposing you. It could be political.
- The Opposer will often oppose because their values are not in agreement with what you are trying to do.
- The Opposer may also be opposing because their job is being affected.
- They also can sometimes be illogical in their opposition.

Suggestions for handling an Opposer:

- Show a high level of acceptance and receptivity for their position. Don't be intimidated. The level of your receptivity to another person will eventually be their receptivity to you.
- Bring other members on side and let them help influence the Opposer.
- Help change the Opposer's perception by showing them the benefits for them.
- Stick to the value the company or group will receive. Stack the pancakes so high that it will be impossible for the Opposer to be selfish without being exposed.
- Develop a strategy to handle their concerns and get “buy-in” in advance.

- **Brainstorm Objections And Hurdles To “Buy-in”**

Just like in handling client objections you need to Brainstorm all the objections, questions, concerns, scenario's that you may be faced with when you launch a new idea. Then have several alternatives for effectively dealing with each issue. Go to the module on Handling Objections and Concerns. They work just as well when dealing with your clients – which are your team members.

- **Find Success Stories To Back The Key Focus Or Principles.**

Try and find credible success stories internally or externally that backs the Key Focus or Principles you are presenting. Often they need proof before they “buy-in.”

- **What Is In It For Me?**

Take time to explore how your people will benefit by following the directions or guidelines you are suggesting. They often care more about how they benefit rather than how you or the company benefits.

Remember to not just talk features, but also explain the advantages and benefits to them. Be clear!

- **Practical Versus Logical Language**

Management often comes from a senior management meeting or a meeting with their partner and the accountant and then go directly to staff members using the logical language used in that meeting. For example we say we need to cut costs, save money, increase profits, increase sales, protect our assets etc. It is called corporate or logical language. The more emotional “Buying-motives” appeal to individuals more. Transfer your logical language to the more personal individual language. The following chart will help.



Buying Motives Summarised

Most Often With Individuals	Most Often With Companies
<ul style="list-style-type: none"> • Comfort • Convenience • Enjoyment • Admiration • Luxury • Good Health • Affection • Sexual Attraction • Good Food and Drink • Beauty • Good Housing • Personal Protection • Relief • Personal Security • Less Work • Safety • No Worry • Become More Attractive • Desire To Possess • Advance In Skill • Self-improvement • Style • Prestige • Recognition • Acceptance of Others • Achievement • Learning • Responsibility • Imitation • Feeling Together • Being An Individual • Feeling In Control • Feeling Complete Power • Doing Own Thing 	<ul style="list-style-type: none"> • Cut Costs • Save Money • Increase Profits • Increase Sales • Increase Productivity • More For Your Money • Long Term Results • Return On Investment • Long Wear • Guarantee • Prevent Loss • Protection of Assets • Lower Your Liability • Tax Break • Save Time • Gain Market Share • Quality • Accuracy • Control

- **Lead By Example**
 This is a very simple philosophy. If you want “Buy-in” from your people be sure you are “sold on” whatever you are taking to them about. If you are asking them to treat customers in a certain way then you need to be the Ultimate example. There must be an alignment with what you are asking and what you are communicating through what you do, think and feel. “If you are going to talk the talk, then you need to walk the walk.”



Module 12

Managing Your Sales Force

Part #2

Learning And Sales Development Outcomes

In this module you will:

1. Be given ideas on how to boost morale, performance and retention with your people.
2. Receive "real world" tips on how to hire top producers and good productive people.
3. How to Retain, Develop, Regain and gain good salespeople.

*Ntsika Enterprise Promotion Agency,
with a focus of rendering non-financial support to SMME's
is part of The Department of Trade and Industry in South Africa.
Ntsika, along with the support of The European Union
assisted in the Initial Development of the
Boosting Sales & Profits With Focus Selling program
in conjunction with Knowledge Brokers International Limited.*

Module 12 Managing Your Sales Force Part #2

Boosting Morale, Performance And Retention

What came first, the chicken or the egg? That is a question that has been debated for centuries and I'm not sure of the answer.

A similar question is, who comes first, the customer or your people? There are excellent justifications for both sides.

In reference to the first section of this module we are going to suggest that in order to gain and keep good clients and customers you need motivated, enthusiastic happy people.

We are now going to look at how to boost morale, performance and retention through carefully paying attention to your people.

Following are a series of recommendations:

- **Positive Surprises**

When you accidentally come face to face with an old friend in an unexpected place there is an immediate excitement and a "burst of energy" between the two of you. Positive surprises are great morale and energy boosters.

Periodically "surprise" your people with unexpected positive things that you can do or say. Following are the examples:

- Unexpected gifts to start or end the week.
- Announcing a positive change in a policy that everyone wanted changed and never thought it would happen.
- Unexpected gifts for their family.
- An excellent referral or lead that is a sure bet for a good size order.
- Taking them to an upmarket restaurant.
- A week-end away for the person and their spouse paid by the company.

Exercise 1:

Set up a monthly program of Positive Surprises for your team and the support people.

- **Take On A Cause As A Group**

As a team take on a "project" or "cause" that is community oriented or one that can make a big improvement as a team. It could be a VIP Function worked on together. These kind of things draw a team together.

- **List Of Small Annoyances**

It is often the little annoyances that can make someone snap under pressure. Brainstorm with your people the little annoyances that they would like to see eliminated or reduced. Then put a plan together as a team to eliminate or reduce them.

- **Include Morale Boosters**

On a regular basis include Morale Boosters as part of building Morale and Performance. These can include:

- The team attending an evening of entertainment.
- The entire team listening to the same audio tapes, videos or enrolling in a self-development program e.g. Dale Carnegie.
- Putting on a summer picnic, beach party, or a trip to a game farm etc.
- A special evening at a Sports Box with media and entrepreneur celebrities present.
- Go for a ride on Rovos Rail.
- Take a cruise on a boat.

... The Moral Boosters are endless.

- **Positive News Clippings / Good News Department**

Set up a "bulletin board" called the Good News Board. Then, on a weekly basis add "Good News" clippings to the board. Review the Good News at your weekly meetings. Also you could have one person as the Good News Department. The person's job would be to circulate good news about the economy, good news about new business gained, good news about things of good news happening in the lives of individuals.

- **Set Up A No Negatives "Buddy System"**

This is where the team sets up a buddy system. The person that is your buddy is there to help you stay positive and is given the permission to point it out if you are being negative about something. Brainstorm the things that the individuals can do to help each other stay positive.

- **Catch Them Doing Things Right**

Set a personal goal each week to catch certain individuals doing things right and complement them on it and at times even give small rewards or recognition among their peers. It is easy to get caught in the trap of catching people doing things wrong.



- **Keep Them Informed – Know Why?**

There is nothing more insulting than finding out what is going on in your department through the office grapevine. Make a point of regularly letting people know what changes are taking place, what's new and covering even the little things like who may be ill, who's wife had a baby etc.

It is tough to follow through on actions, especially during challenging times, if we do not understand the "why's" Whatever action you are working on, take the time to list all the benefits and rewards others will receive by them accomplishing what has been set out to do. Knowing "why?" is the fuel of motivation. With the motivation you will find the "how?"

- **One To One Time With You**

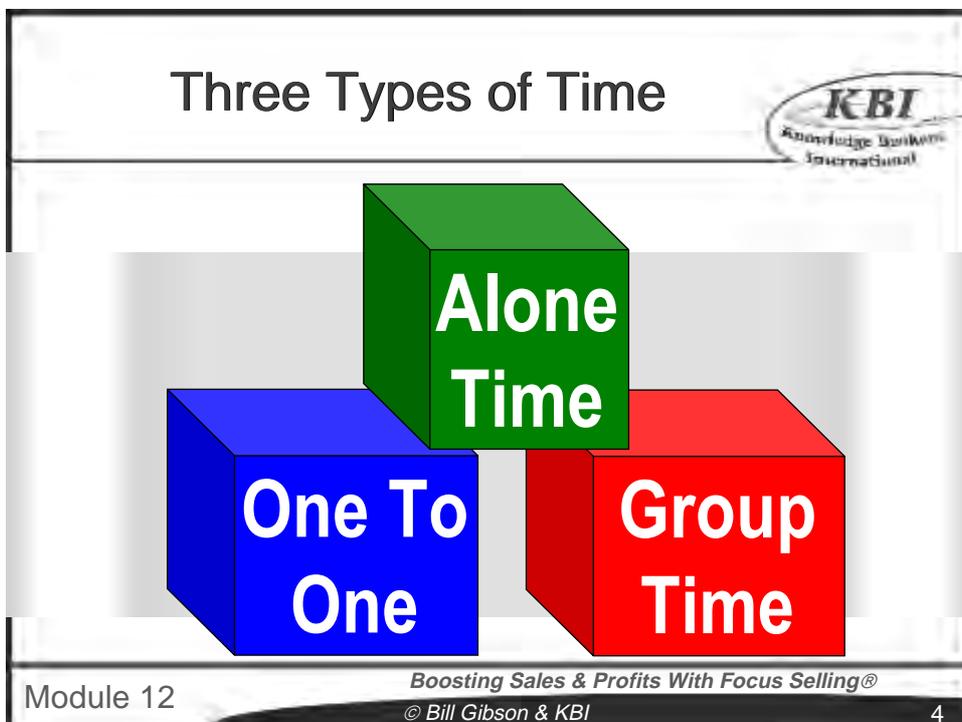
If staff only get time with you when others are present it leaves a gap. On a regular basis, take the time to have one-to-one time with each salesperson and support people. People open up in a different way when there is just the two of you present.

Exercise 2:

Put together a One-To-One Time plan on a monthly basis with the people that report to you. Even a one-to-one phone call will work if you are geographically in a different place. Utilise a form similar to the one below.

One-To-One Monthly Plan			
Name: _____		Month: _____	
Who With	Type of One-to-One Time	By When	✓
1.			
2.			
3.			

Balance One-To-One / Group / Alone Time



Physiologically we all need a balance of one-to-one time, group time and alone time. If you have too much group time with others and too much one-to-one time with others you will start to want alone time to balance yourself out. If you have too much alone time and one-to-one time you will start to seek some group time. As a leader it is important to know this. You cannot expect someone to always want to be part of a team / group. They will want alone time as well as one-to-one time with you and other people. Explain the concept to your people so they become aware of trying to balance these three types of time.



Exercise 3:

(a) Support Staff

ONE-TO-ONE	ALONE	GROUP

(b) Sales Team

ONE-TO-ONE	ALONE	GROUP

(c) Your Management Team

ONE-TO-ONE	ALONE	GROUP

- **Keep Score**

If people played sport and they did not keep score there would be very few players and virtually no fans. Everyone likes to know how well they are doing. Visual graphs, milestones, daily and weekly feedback on what has been accomplished, helps to fuel the fire of motivation. On long term projects the real results may not be seen until it is complete, but the motivation can lessen because of a lack of feeling of accomplishment. Set milestones and see them as “points of achievement”. This is a way of keeping score. It is also important to stop and celebrate how much your people have achieved. People do what is measured. Keep score.



- **Get Quick Results**

If you have to wait forever to see results it is easy to lose momentum. It is important to pick several “to do’s” that your people can accomplish quickly or that show quick results. As you know, in selling, if you start off the day with a couple of small sales, it still feels great and you automatically pick up speed. Make sure you show quick results to your team when you say you are going to do something.

- **Visual Action**

Another way to keep things moving is to start off with projects or actions where you and others see the action visually. If the name of the company on the door of staff’s car was an idea ... do it immediately. You can see it ... it means you have moved to action! A new computer motivates others. You can see the action. If you are working on a three month project try and execute a visual action every couple of weeks.

- **Utilise A Mentor / Model**

If possible seek out other people or companies that have accomplished or are experts at what your people are trying to do. Have them study these people and if possible meet them personally. As they get to know them, they will realize that these people are ordinary people just like them. At that point they realize that if the other person can do it, then it is possible for them too. These people and companies become models of possibilities. An indirect mentor / model is someone who you do not know personally, but you study them through books, tapes etc. A direct mentor / model is someone you invest time with and study and learn about. Remember the more your people get to know mentors the more they realize the mentor is not perfect. Tell them not to write that person off. Tell them to celebrate, because if the mentor can do it with their problems, it means it is possible for your staff members too.

- **Reward Your People In Advance**

Have you ever given a waiter or waitress a tip before they served you? Try it. You will be amazed how quickly they become motivated. The same principle can apply with your people. You may want to reward others for a project or action they are going to take before they actually do it. That is like someone getting a new job and he or she goes out and buys a new outfit to help her perform better. It is a reward in advance of doing the actual work. Look for ways to reward others in advance. It is inspiring. A Pre-Promotion Launch Party is often a celebration in advance.

- **Avoid Self-Sabotage And The IFD Trap**

Within everyone of us there is a part of our ego that likes to sabotage us just before we are about to win. When it comes to implementing new ideas where we are on a schedule of developing new habits the “sabotage” ego often steps in. Here is how it happens.

You decide to exercise four days a week. The first few weeks you are right on schedule then one night you go out and over indulge with friends and don’t feel like exercising the next day. You drop your exercise that day and a day later you are exhausted from working and you skip another day. Inside of you a part says “I blew it, what is the use? I am off my schedule.” At that point many people give up on themselves. Here is the key.

Just start again as if you had not even missed a day. Compliment yourself for starting again and just say you will do better this time. Most important of all is: Do not beat yourself up. Just get back in there and laugh it off.

This type of scenario could happen when you decide to make a certain number of calls each day, decide to go to work early each day, etc. It is not easy to develop new habits overnight. None of us can control all the external circumstances that assail us. The only thing we can control is our reaction to those situations. So be ready for that part of you that may try and sabotage your actions by making you disappointed in yourself. Be kind to yourself and “laugh off” that part that tries to play the sabotage game and just pick up where you quit or felt like quitting.

Explain this concept to your people and help them to not be too hard on themselves. A lot of people get caught in the IFD Trap. That is, they don’t set realistic goals. Instead they idealise how something is going to turn out or what they think someone else should behave like. Their unrealistic view leaves them Frustrated and from there Demoralisation sets in. How they move away from Demoralisation is by Idealising again on something else or another “flavor of the month”. It is called the IFD Trap. The key is to set realistic goals and objectives and not be too hard on yourself. Help your people do that.

I F D TRAP

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6

• **Training Plan**

Develop a simple training plan form like the example below, then sit down with each of your people and determine where both of you agree there is a benefit for that person to improve in a specific area. Set a budget or find the money from suppliers, etc. and implement an action plan for training. Very few departments and small businesses have a written training plan for each staff member. This simple form can make the difference.

Module 22

Training Plan

Name	Training	Source/ Method	Investment	Timing	Completed & Comment

The Complete Sales Action System ®

• **Motivation/Personal Development Plan**

Don't just focus on sales skills and product knowledge. Motivation and personal development produces a benefit in all areas of a salesperson's life. This unleashes the person's power from the inside-out.

Try the following:

- Set up a library of motivational audio tapes, books and videos
You could ask everyone to loan tapes, etc. to the library and appoint a person to keep track of who's got the learning materials. You could have a 10 minute motivational message from one of the salespeople at each meeting.
- Motivational Speaker/Individual
Invite an inspirational individual or motivational speaker to speak to your people at least 6 times a year. An acclaimed athlete or someone who has overcome adversity etc. are a couple of possibilities.
- Attend Inspirational Events
Seek out inspirational events like motivational speakers who are speaking at public venues. Take your salespeople. You could also take your people to a professional sports game and at the next meeting review what they think the elements were that created the winners and the losers. Relate it to sales and life.
- Everyone on the same program
This is where the entire team decides to read the same book, listen to or view the same tapes, or attend the same seminar series. This is the best way to train and develop because there is support and group enthusiasm.
- **Participation - Involvement**
Wherever possible don't tell! Ask for opinions or solutions. Once the energy flows both ways, people will take ownership, grow, develop and produce better results. People like to participate. They do not like to be talked at.
- **Awards/Recognition/Remuneration**
Not only should there be awards, recognition and remuneration for sales performance, there should be the same for doing other things that help people grow, develop and produce. You could give awards, recognition and remuneration for doing the following.
 - Listening or viewing certain tapes.
 - Reading the "book of the month"
 - Bringing in new accounts
 - Making a certain number of new calls per month.
What is being suggested here is, if you get your people doing the things that lead to more business the business will automatically be generated.

Field Training And Development Calls

New people need lots of one-to-one training and experienced people need to be "tuned up" from time to time. One of the best ways to accomplish the above is with Field Training and Development Calls. Here are a few suggestions.

- **Half to a full day**
A 20 minute call with someone is not enough time to get into the flow. Try and give the salesperson a full day or at least a half an day. This gives you a fair look at the person and it also gives both of you the time to uncover deeper issues or the time to begin implementing new ideas.
- **Why am I going?**
Just as you suggest to your salespeople, you have to have objectives if you are going out on the call. They could be one or more objectives similar to the following:
 1. Develop rapport with the salesperson
 2. Teach certain skills
 3. Monitor progress
 4. Introduce and educate on new products or services
 5. Provide support
 6. Try and discover why performance is down
 7. Find out why this person is such a strong performer.
- **Why am I Here?**
Before the salesperson makes the call makes sure he/she has certain objectives in mind. If you know what the salesperson is attempting to achieve, it is easier to assess, support and train. In the case of in store sales training, or in a showroom at a dealership, or in an office or a bank the above two points on knowing why would still pertain.
E.g. As a customer is walking towards a showroom, the salesperson could quickly let you know his/her objectives.
- **Training or Selling**
If your main objective for the morning is to train the person then do not butt in and take over if the salesperson is not doing too well.
- **Let the salesperson do it**
Let the salesperson handle the call. Be aware that if you are with the salesperson he or she will be a bit uncomfortable and probably not perform at his/her normal level. By letting the salesperson handle the call or situation, you show confidence in him/her and you also demonstrate your commitment to training and developing him/her.



The exceptions to this rule are;

a) You don't want to risk a large transaction. If a salesperson is in the middle of losing a large transaction because of lack of skills, why is he/she handling this account at this time? All rules are made to be broken under special circumstances. If you see a big transaction going out the door and you cannot afford this, jump in and save it. Afterwards apologize to your salesperson, explain why you did it, and review what you both learned from this experience.

b) Agree in advance. This is where you let the salesperson know you will handle the call to demonstrate what to do.

Review

After the call, do the following:

1. Ask the salesperson what went well. Listen to the feedback, suggest a few other areas where you felt it went well and agree with the salesperson on his/her points if appropriate.
2. Now ask the salesperson where and/or how he or she could have improved or been more effective. Listen! Most of the things you would have pointed out, a salesperson could probably tell you if you give him/her time. It is insulting and demotivating to be told something about yourself when you are about to admit it without the prompting. Once the salesperson is finished you can then expand on a few areas where you felt he/she could have been more effective.
3. Now ask the salesperson where he/she could see future or new opportunities with this client and then add your own.
4. Ask him/her to identify possible problems that could come up in the future and how to rectify them. Add your point of view.

The above 4 approaches let the salesperson feel accountable and respected and at the same time helps him/her take responsibility for the future.

Coach Feedback Form

Design a simple feedback form for the end of the day or for a specific meeting. Have the salesperson rate him/herself on a scale of 0 to 10 and explain his or her reasoning. Listen first before giving your opinion.

Also ask the salesperson how you could be more effective in the one-to-one training and development process. Listen!

Thank the Salesperson

Thank the salesperson for the day and re-cap the positives. Remember how often someone has suggested to you to do things differently and you defended, but a week later you saw the wisdom in the suggestion and changed your mind. Be patient.

Set the Example

If you want your people to continually grow and develop, then once again, the best way is for you the sales manager, to be doing it yourself. Here are a few suggestions:

- Enroll in a sales management, marketing, or communications program
- Continually listen to and view tapes
- Commit to reading a certain number of books per year.
- Attend events and seminars with your people as a participant, not as an observer who feels that he/she does not need it. Everyone needs continual development, even if it is to set an example.
- Loan your books and tapes to your people.
- Be the example!!



How to Hire Top Producers

"You don't make top producing salespeople, you find them"

Top producers or potential top producers possess certain characteristics and even if they have no experience, with proper coaching you can unleash that powerful potential.

As a professional Sports Team Coach once said to me during a casual meeting on an airplane flight, "Top producing players are like top performing race horses, they have to have a heart, that extra will to win and that "give it all" attitude".

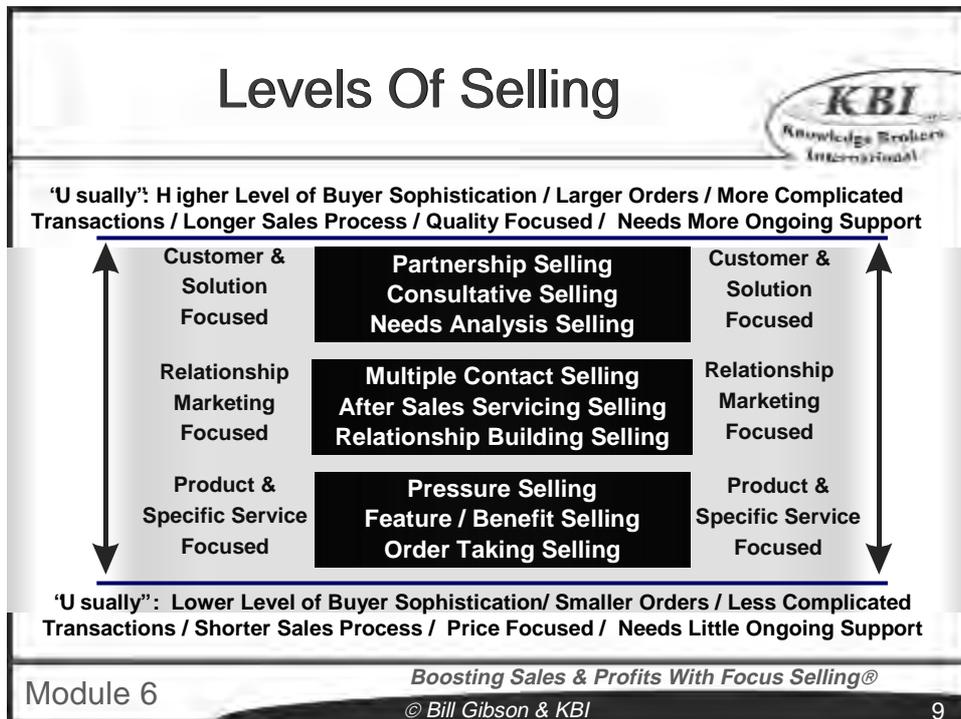
As a sales manager or business owner, you are never looking for someone to fill a chair or position, you are looking for a person who will go "over the top". Imagine 8 people on your sales team who are all top producers. Your job becomes a pleasure with the exception you will feel like you are trying to "Herd Cats" because they have their own minds. The starting point for top producers is to find them and hire them.

- **Know What A Top Producer Looks Like, Talks Like, Acts Like**

Here are a few suggestions in clarifying exactly who it is that you are looking for.

- **Write up a complete description of the type of sales job it is, including the following:**

1. Amount of phone selling, cold calling, proposal writing, group presentations.
2. Geographical area
3. Amount of travel
4. Amount of time away from home
5. Level of independence
6. Hours expected to work
7. Work culture of the company
8. Reporting and paper work expected
9. Client entertainment factor
10. Type of customers or potential customers
11. Level of acceptance by the customer in reference to
 - the company
 - the products and service
 - the industry



12. Level of selling - see Module 5
13. Size of average sale
14. Length of the selling cycle and any other important factors you can think of.
15. Trade show selling and seminar selling etc.



Exercise 5:

Build your own complete description of what a job as a salesperson entails in your company. This list will help you decide the kind of person you need. It will also allow potential salespeople to see if they think they can or will do what is required.



- With the above job description in mind, carefully describe the characteristics, behaviors, values, skills, experience and abilities you require in this person.
- The long list of points you have generated about the potential salesperson, serves as the criteria to help you make a wise choice. These points can be categorized with the "ABC method".

Absolute: List the points about the ideal salesperson that you feel are vital or the person must **absolutely** have.

Beneficial: Now list those points that are not absolutes but would be **beneficial** if they were found in the potential salesperson.

Convenient: These points would be the icing on the cake. It would be **convenient** if the person possessed these points.

If four applicants have all the "absolutes" and "beneficials", the applicant with the most number of valuable "convenient" will usually be the choice.

During the interview, the ABC method gives a common foundation for everyone involved in the selection process to evaluate using the same criteria.

Exercise 6:

Brainstorm and refine a list of all the qualities and skills you would like to see in the type of salespeople you'd like to have on your team. Then decide which ones are A – absolute, B – beneficial and C – convenient for them to have.

Qualities & Characteristics	A / B / C



You are always hiring

With your associates, your network and yourself being aware of these characteristics, you can all have your hiring antenna up at all times and recognize a good prospect when you see one.

It is wise to "advance hire" which means that when someone fits the description, you interview him/her without that person knowing you are interested in hiring him/her. Over time you can assess them without any commitment to hire. You may not mention your interest in hiring them and still put their information in your "Advance Hiring File." You may also ask them their level of interest if there was ever an opening in your sales department. It is wise to always have a number of possibilities on hand so that you are not caught short. By the way, I know sales managers who always carry one or two new people in training just to be ready when a change occurs.

Another source for your "Advance Hiring File" is recruitment advertisements by other companies that target the type of people you want to hire. If you need to hire someone shortly after the ad ran, contact the sales manager to see if he had more than one good candidate for the job. Most people will give you the names with permission by the applicant to do so.

Birds of a feather flock together

One hiring principle that has stood the test of time is the above statement. Find out who the associates and friends are that your top producers and those in other organizations, invest their time with. Put the word out within those networks of people with a clear description of who you are looking for.

The one caution in this situation is that sometimes the "old boys network" takes preference over how productive a person may be. They may suggest someone because of the affiliation and may not consider the person's effectiveness, or may be misled by the social side of the person.

Get salespeople involved in the hiring

During the hiring process be careful of your "blind spot". Everyone has a blind spot. This implies that you may be impressed with certain qualities and want to push ahead without seeing a few of the weaknesses or flaws that could have an adverse affect.

Your present salespeople have to work with that new salesperson, sales secretary, etc. Have a couple of your salespeople involved in the interviews. If they give the green light, they have an investment in the results. If it does not work out then it was a team mistake, not yours alone.

Consider a recruitment fee

As you know we often pay "Head Hunters", Personnel Recruitment Agencies, a percentage of the new person's wages for 6 months to a year as a fee for finding, qualifying, checking, etc. A small percentage to a salesperson who delivers a good person to you or a standard fee each month that person stays in the first year, could make a salesperson really alert in reference to finding good people. The monthly fee would ensure that the salesperson helping the new salesperson be successful. This is one of the reasons that multi-level marketing has become so powerful. People recruit people into their "down line" and profit from that person's performance. They invest in these people and do everything they can to keep them motivated and grow them in the industry. Consider the benefits of putting this concept to work in your business.

Heart, Ego Drive and Empathy

Just a reminder of three qualities you may consider when hiring. Heart was covered earlier.

Ego Drive means "how fast you get back in there after being knocked down, disappointed or rejected."

Empathy means the ability to put yourself in the person's situation and see, feel and think as the other person would. This is a part of rapport building.

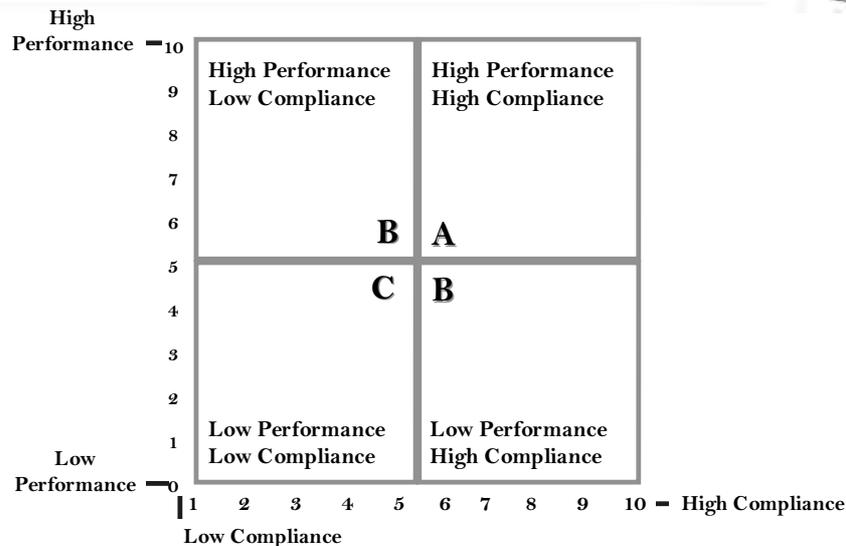
Don't let appearances fool you

You can't judge a book by its cover but an attractive cover earns the book a second look. Yes, appearance is important but don't get caught in "stereotyping" what success looks like. There are many great salespeople that would never make the cover of Vogue. Look at some of the chairmen and MD's of some of the most successful companies in the world. Salespeople come in all shapes, sizes and colors. The inner qualities, their work ethic, values, beliefs, attitude, communication skills, and rapport building abilities far out weight the value of appearance with other key factors missing.

Performance versus Compliance

You may want to look at the performance/compliance grid and assess your present team. When checking references you could ask for a number from 0 to 10 on performance and 0 to 10 on compliance. When you get the number, politely request additional information as to why the person is giving you that number on the person you are doing the job check on.

Obviously, the ultimate is someone who is high on performance and high on compliance (team player and cares about and works within the systems and guidelines of the company).



Personality Profiles - Set your own Standards

Many sales managers reading this material already have an assessment tool that gives them an idea of the personality characteristics of the applicant.

Even though there are general qualities that are agreed upon as universal skills and attributes that top producers have, many of these may not be totally fine in reference to someone selling your products, services or working with your clients or in your geographical market.

Determine what "level of selling skills" the person has. That way the characteristics and skills are more easily identified. One of the most effective things you can do is to conduct your own research.

Take several of your top producers and identify their personality styles and the characteristics that go with them. Then do the same with a few of your bottom producers. Keep the information as a reference and put names to the profiles. This way you can say, "This applicant has similar qualities to Siphon and Annette". By doing this you have set your own standards.

Check the References

Lots of sales managers rely on their instinct and do not check the person's references or speak to previous employers.

Here are a few suggestions:

- Dive into your network of contacts and locate "someone who knows someone who works in that company or has previously worked there". Get an informal reading from that person about the applicant's work habits, etc.
- When talking to the contact, utilize not only the performance/compliance questions but do the same with the quick read instrument in Module 4. For example, get a rating 0-10, quiet to outspoken, and 0-10 unstructured to structured. Ask the person to expand on what made them pick that number. With this information you can obtain a general impression of the personality profile of the applicant. Each profile has strengths and weaknesses so you can see how the person fits your criteria.
- Another way is to have ten questions and ask for a 0 to 10 rating again, then ask the person to expand on why he/she picked the number.
- If the contact is in your city, you may want to buy that person a cup of coffee and ask a few questions about the applicant on a personal, confidential basis. Some people are reluctant to give information on the phone but are more open in person. This is important when filling key positions.

Don't Oversell the Job

When you are totally convinced the person is who you want, you then need to cover the features, benefits and advantages of him/her joining your team. A word of caution here is to not oversell. Remember the saying "under promise and over deliver". If you over promise, the salesperson may end up feeling betrayed and be disappointed.

Be the Best - Attract

One of the best ways to attract the best salespeople in your market is to be the most admired and respected sales manager to your professionalism, coaching, managing, marketing, selling and fairness. Be known as someone who "looks after" his/her sales team. In other words, let your actions be your best form of recruiting. *Be the best and attract the best!* Never stop developing yourself and continuously show your people you don't just talk the walk, you walk the walk.



A Few Extras - Watch Out

Following are a few things that may give you a signal to be cautious:

- If the applicant is always moving, it may be a sign he/she can't stay in a relationship long or sells more on a short term basis, possibly burns the market and moves on.
- Job gaps and "company no longer exists". During job checks always ask starting date and finishing date. By stretching the dates an applicant can leave out the jobs he/she had where there were problems.

Top producers are very seldom out of work for long periods. If a gap shows up on the applicant's job history, investigate a bit further. You don't need surprises after you hire the person.

It is not uncommon for a less than honest applicant to list companies he/she worked for that don't exist now. You may ignore calling that company because the key people are impossible to find. You could also ask the salesperson who some of the suppliers were, some of his customers and who the owners were. A couple of phone calls to the suppliers or customers can give the necessary information you need to find out more about a salesperson.

This process of asking the salesperson the names of a half dozen clients is good but it is important to get his/her permission to phone them.

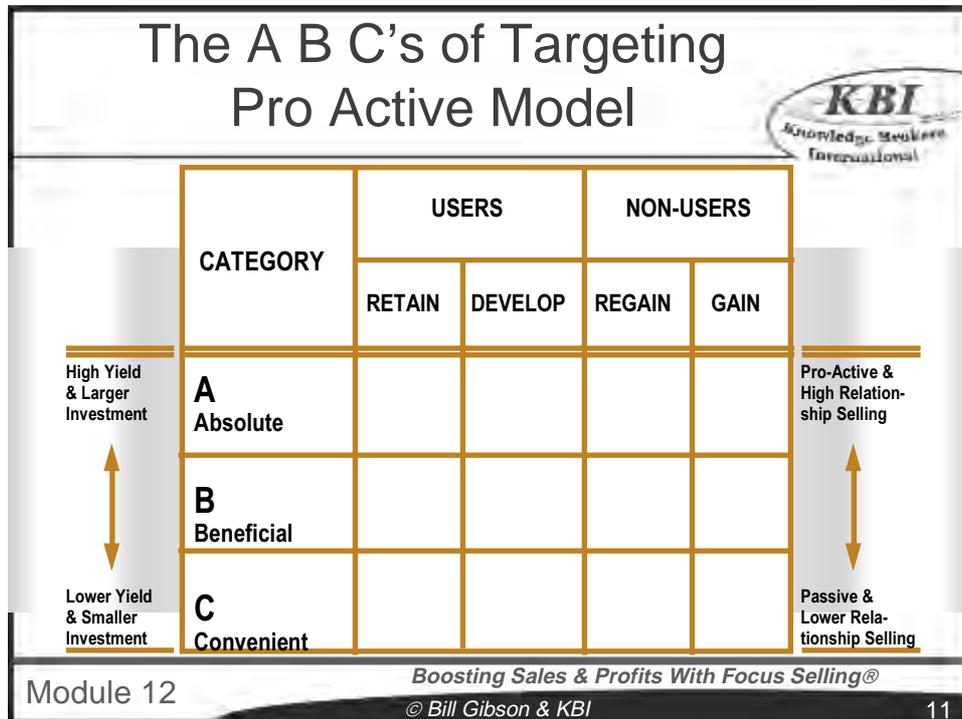
- 22 Years or 1 Year 22 Times: Number of years on a job does not necessarily result in a top producer. 22 Years of continual improvement is the key.
- Problems - Home/Money/Past Job
- None of the above mean you should not hire someone. Sometimes problems on the last job can be justified or the person learned a lesson. Money problems could motivate someone to sell, problems at home with relationships, etc. could be justified and not be a reason to say no. The key here is, how bad are these problems and do they hamper the abilities and is this a pattern that cannot be changed?
- Over Qualified - Over Educated

There is a saying: "The person is educated beyond his intelligence". If someone sees himself qualified beyond the position he may not last long or he may think his level of education is the key to success versus what he does with that information.

- Careful - The best or the worst - or average?
- Don't look for an average person. An average, is the best of the worst, and the worst of the best. Aim high! Always aim for 9's and 10's even if you are an 8 as a business owner or sales manager.
- Fit the Culture and Demand
- Make sure the person fits the work culture. Everything may look fine but the person you are hiring works 9 to 5 pm and has evenings and week-ends planned for playing on sports teams, etc. Now, if the culture of your company is that most people put in one evening a week, meet every second Saturday for a Saturday morning meeting and attend social functions with clients, you may be better off with someone who can deliver the same results but can live within the culture.

We are not suggesting that a 9 to 5 pm person is wrong, what's being said is he/she may not fit.

Retain, Develop, Regain, Gain Good People



The same model you use for managing your client and prospect base also works for gaining, developing and retaining good people.

It is important that as a business owner or sales manager that you always have A, AA, and AAA Potential salespeople in your A Gain Column. Put these people on a data base and begin to build a relationship. In the beginning they don't need to know they are on your list. That way you can change your mind without hurting the relationship. You can hire and dismiss them without them even knowing they were hired and dismissed.

Let's look at the 4 strategies. In this case we will start with the Gaining of Good People.

The Gain Strategy

- **Set the Criteria:**
 Know what an "A" Salesperson would look like.
 E.g. Age 28 –40 years of age
 Owned their own business.
 Proven track record in Sales.
 Can deal with top executives.
 Self Empowered.
 Excellent presenter to group.
 Etc., etc.
- **Utilise your network for introduction:**
 Let your network know the kind of person you are looking for. Have your network introduce you or give you good referrals. They won't normally introduce or send you to anyone that isn't credible.
- **Be seen where These Potential Prospects are present:**
 Once you know what your Ideal salesperson looks like identify the type of associations, organisations, events and establishments these people would frequent. Launch a "Be Seen" program so that you meet these people.
- **Utilise frequency of contact and be of real help:**
 With these potential salespeople you will usually be at the Attraction, Exploration and Development Stage so it will require frequency of contact and value adding time to develop the relationship. Have a system of follow-up and pre-planned things you can do to add genuine help and assistance in their life.
- **Utilise your network for introductions and referrals:**
 Your best network contacts are clients and associates you are at the Commitment and Unity Stage with. Draw on these people for introductions and referrals. They can help accelerate the relationship development because of their credibility with the potential salespeople they refer you to. Be sure to keep your network contact in the loop as to the results you've had with the person they referred you to.



- **Continual prospecting:**
To Gain business you need to continually prospect. The potential salespeople pipeline must be kept full. Decide the number of potential salespeople you want to continually have on your GAIN list that you are continually contacting and building the relationship with.
- **Be a professional at rapport building:**
Become a person that has mastered the Art of Rapport Building. This is vital when attempting to gain good staff. Modules 3, 4, 5 and 6 will be extremely helpful in tuning up your skills.
- **Be unique:**
Know and show your own uniqueness and that of your products, services and your company. At the Attraction and Exploration stage you need to display some uniqueness, special expertise and a different and valuable way of doing things to convince the person to want to consider joining you.
- **Treat Them As If They Are Already Part Of Your Team By Involving Them:**
This week at KBI we have invited a potential executive to fly from Durban to Johannesburg and join us at a function with potential clients. It is the second function this week. He is already feeling he is part of the team ...
- **Make Them Part Of Your VIP Strategy:**
If you decide you eventually want the person to join you, treat him / her as if she / he is a VIP client. Do special things for that person.

Regain Strategy

- **Treat Them Well On The Way Out:**
A good Regain Strategy starts the moment someone decides to resign. Treat them well, be understanding and wish them well. Tell them how valuable they have been and that they are not replaceable. Go overboard with a farewell party and gifts. Also give the person a great reference letter.
- **Regular Follow-up**
Put the person on your data base. Keep in contact on a regular basis and keep them in the loop as to what's going on. Assist the person where you can.
- **Let Them Know They Are Missed**
Tell them they are missed by everyone, and that they were of great value.
- **Invite Them To Reconsider**
Most people that resign and go elsewhere are usually too proud to admit they are not happy with the new position. Let them know that you and the team would welcome them back at anytime and please don't be too proud about coming back if they wanted to.
- **Introduce New Positive Changes**
Most people leave for a reason. If you've made positive changes that they would appreciate then let them know about the changes.
- **VIP Treatment**
Continue to include them in VIP Functions and the VIP Treatment.
- **Humility / Apologise**
If an apology is necessary ... apologise. Good people often leave because their feelings were hurt or they were not handled properly. Apologise if it were appropriate. You'll be a "bigger person" because of it.

Real good producers are hard to come by. If you lose a good one, don't be afraid to try and regain them. You've already invested a lot. A Regain Strategy is only for the ones you really want back.

Develop Strategy

You will have salespeople that are new and you need to develop them or develop the relationship. You will also have people that have been with you for quite some time and you haven't developed the relationship as far as you'd like. Following are a few suggestions on the Develop Strategy.

- **Personal Analysis**
Take the time to get to know their aspirations, goals, likes, dislikes and motivations. That way you can help fulfill some of those for them.
- **Assist With Developing A Career Path**
Someone you want to develop needs a career path. Sit with them and design one. They will feel part of the long term plan.
- **Add-on And Increase Responsibility**
- To grow them and make them feel good about themselves add-on and increase their responsibilities at a speed they can handle. Responsibility is a motivation according to Herzberg.
- **Be Pro-active With Relationship Development And Sales Development Support**
Focus on doing things that get you to the Commitment and Unity Stage of the relationship. It is at those stages that a person will become loyal to you and go the distance. You become more like associates or partners instead of boss and employee.
- **Special Treatment**
Give this person the kind of treatment you'd give a AA Retain salesperson. Treat the person like a AA Retain and they will usually become one.
- **Frequency Of Contact**
Set up a Frequency of Contact plan and have regular one-to-one time with the person.

Retain Strategy

- **Be Pro-active**

As management, we often devote most of our time to try and get our non-producers performing and forget about our AA Top Producing salespeople. With these people be Pro-active in solving problems for them and providing support in areas they would rather not handle or don't have the time to handle. Providing a part-time assistant could be helpful.

- **Incentives For Loyalty And Special Treatment**

If you've got an A Producing Retain salesperson they should receive special treatment and incentives for their loyalty. It could include days off, certain expenses paid, giving them referrals, memberships to clubs etc. Treat them like you would a top client because they are.

- **Relationship Building**

Put in Time with them, give them real assistance. Become a close associate and respond immediately in a time of need. Many staff members have made up their minds to devote their working lives to a company or leader because of the Leader's caring response during a tough personal situation.

- **Some Developing**

There is always room to continue to do some developing of the person and / or the relationship. Remember to continue treating the person well. In our personal lives it is easy to forget to romance that significant other you've been with for 15 years. The same applies with long term valuable people. "People go where they are invited and stay where they are appreciated."

- **Update A Personal Analysis**

Be sure you have all the pertinent personal information on this person. E.g. Spouses name and employment, names & ages of children, hobbies, sports, interests, spiritual and religious directions and a host of other things. The more you know about them, the easier it is to add value.

- **Data Base Approach**

Set up a process of follow-up with this very important person. Have a record of birthdays, anniversaries, important events and plan your frequency program.

- **Close Monitoring**

Just like with AA Clients, you need to closely monitor the relationship and don't let relationship deteriorating things move in. Be aware of the things that can put the relationship at risk and be prepared to put a plan together to change or correct the situation.

They include:

- Political differences with other Key Personnel
- Poor backup support
- Policies and changes adversely affecting them
- Competitors are aggressively pursuing them
- Turned down for additional expense coverage
- Unhappy with the compensation structure
- Had not had any one-to-one attention from management for quite some time
- Change in management
- Key support or close associate leaves

To replace top people is very expensive and it could take months and years to fill their shoes if ever. A good retention program is key.

Summary

In this module you have been reminded of all the things you can do to:

1. Boost Morale, Performance and Retention.
2. How To Hire Top Producers.
3. Retain, Develop, Regain and Gain Good People.

Find and build your people and they will build your business. To end off, lets take some advice from Bonang Mohele, who is the Chief Executive Officer of Drake & Scull Facility Management in South Africa:

Bonang says:

"Employing superstars is fine, but the team is far more important than the individual. It's important to recognise the skill of an oboist, but even more important to recognise the significance of the oboist in the orchestra. Without a team there's no sustainable business.

The challenge of business leaders is to build a peak performing team, that is much more than just a group of individuals under one roof.

Only a strong team can function in a market that is now open to global competition."

I would agree with Bonang about the team and to make it really work hire top producers yes, but hire ones that are also team players.



Exercise 7:

Layout the specific actions you will implement on a regular basis to improve your Retain, Develop, Regain and Gain Strategies with Good People.

Retain Strategies	Develop Strategies
Regain Strategies	Gain Strategies

Acknowledgements From Bill Gibson

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Our contact details are:

Knowledge Brokers International S.A. (Pty) Ltd.

Tel: +27 11 784-1720 Fax: +27 11 784-2361

E-mail: bill@kbitraining.com

Web site: www.kbitraining.com

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- The Sunday Independent
- Weekend Argus
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