

### *Praise for This Book:*

“The Top Ten Myths of Selling, the extensive checklists, and the worksheets are worth the price of this book alone. But what might have a bigger impact on your selling success after reading Lambert’s work is the understanding, then application of the idea that great sales professionals ‘Embrace a Sales Mindset’ (Step 1). This just isn’t taught in training, and you’d be wise to put it into play—and then see what a difference it makes in your performance.”

Dan Seidman

Author and sales training consultant, SalesAutopsy.com

“Once again, Brian has written a book that will raise the bar for sales professionals around the world. This book should be required reading for all salespeople. Brian represents the next generation of thought leaders in the sales profession and following the 10 steps he outlined in this book will deliver the sales results you’re looking for!”

Tony Cross

Founder, Growth Matters, South Africa

“This is a fabulous sales book that sets itself apart from the other overly simplistic approaches to selling. Take action on its contents, and you’ll build long-lasting relationships and accelerate your revenue performance! It should be required reading for new and experienced sales reps alike.”

Aaron Steeves

Branch Manager, Ricoh Business Solutions

“Core essentials every new rep should know and a great refresher for seasoned pros!”

Marc Ramos

Director, Sales College, Red Hat University

“This is a great book for sales managers that need to move their team from transactional to solution selling—even in the retail environment!”

Marc Imhoff

Retail Channel Senior Manager, France Telecom-Orange

“A great read. It clearly defines how you can move from salesperson to sales professional while becoming a trusted advisor to clients!”

Kevin Casper  
Sales Professional, EMC

“I’ve been selling long enough to know a good sales book when I see one—and this is a great book. It contains everything I wish I was told but had to figure out on my own. Managers should give it to every new salesperson on the team and use it as a topic to train at sales meetings!”

Rick Tancreto  
15+ years of experience selling for Fortune 500 companies

“This is a great book for any salesperson who needs to be consultative in their approach. It defines what you really need to know and do to be successful!”

Eric Kerkhoff  
Account Manager, Hewlett-Packard Company

“Selling isn’t easy, and learning how to leverage people, technology, processes, and conversations to move the sale forward is a must. This book helps you do that with easy checklists and words of wisdom from seasoned sales pros in an easy-to-read format.”

Scott Barghaan  
Client Solutions Director, Large Global IT Company

“Professional selling is complex and no one understands it better, while relating it simply, than Brian Lambert. This single book covers everything selling has become, not what it used to be. You MUST know this stuff if you want to do more than just keep up.”

Tim Ohai  
Strategist and Coach, Growth & Associates  
Co-author of *World-Class Selling: New Sales Competencies*

“After 20 years in professional services, I found myself in a sales role. This book helped me make the transition quickly and easily.”

Allan Mills, MPM, PMP  
Regional Director, Eastern US Branch, True Solutions Inc.

**1 0   S T E P S   T O**

Successful Sales

# 1 0   S T E P S   T O   S U C C E S S

Let's face it, most people spend their days in chaotic, fast-paced, time- and resource-strained organizations. Finding time for just one more project, assignment, or even learning opportunity—no matter how career enhancing or useful—is difficult to imagine. The *10 Steps* series is designed for today's busy professional who needs advice and guidance on a wide array of topics ranging from project management to people management, from business strategy to decision making and time management, from leading effective meetings to researching and creating a compelling presentation. Each book in this new ASTD series promises to take its readers on a journey to solid understanding, with practical application the ultimate destination. This is truly a just-tell-me-what-to-do-now series. You will find action-driven language teamed with examples, worksheets, case studies, and tools to help you quickly implement the right steps and chart a path to your own success. The *10 Steps* series will appeal to a broad business audience from middle managers to upper-level management. Workplace learning and human resource professionals along with other professionals seeking to improve their value proposition in their organizations will find these books a great resource.

1 0   S T E P S   T O

# Successful Sales



**Brian Lambert**



Alexandria, Virginia

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# P R E F A C E

Nothing happens in the business world without selling something. If you've been selling for longer than a few months, you probably have realized that selling is extremely complex and involves life-long learning and experimentation to find those strategies and tactics that increase the chances of a sale and position you to become a trusted advisor to your clients.

This book is specifically designed to help you succeed in the foundational, business-critical profession of selling. These trends are a small sample of the change (and some would say chaos) that you'll have to harness and leverage to be successful. Just like any other professional, overreliance on a specific routine or approach could be detrimental in this fast-paced environment. The market is fluid and buyers require speed and agility. *10 Steps to Successful Sales* will help you transition quickly and effectively from salesperson to sales professional while improving and reinventing yourself and your approach.

**Why Another Sales Book?** Most books on professional selling are considerably different than this one. When writing it, I sought to fill a void and address what I consider a crucial problem in the sales profession: a major lack of structure, framework, and definition of *what* professional selling entails. There are a lot of books on *how* to

sell but few that explain what to expect. This lack of clarity creates inconsistent performance in most salespeople and stems from several factors. First, academia has yet to be recognized for advancing the sales profession. Despite the fact that there are many schools offering minors in professional selling, the academic community is not considered the catalyst that drives the sales profession forward.

Second, there hasn't been a major advance in the sales process (for example, the sales funnel) in almost 100 years. In reality, the fundamental steps of the sales process haven't changed, but many organizations and individuals have reinvented them over time (hint: memorizing a five-step process isn't going to solve all your challenges; there's more to it than that).

At the turn of the century, there were three associations in selling and three major publications devoted to it. There were also degrees in salesmanship and there was even a global congress on selling. Since that time, the sales occupation has yet to collectively pull together into a unified profession.

Third, most salespeople have existed in a fragmented occupation without guidelines or unity. Lacking this unity, people are reinventing the wheel. Instead of 50 years of knowledge being built, we have had four years of knowledge being built (and rebuilt) over and over again. Most authors are writing and rewriting the same content, such as how to handle objections, how to ask questions, and how to close a sale. I have books in my office right now from 1912 and 1947 that talk about these same steps of the sales process. This is helpful and means there is a specific set of knowledge you need to know as a salesperson. It also means you have a choice to make: follow in the footsteps of those before you or chart your own path for sales professionalism. If you choose the latter, you can set yourself apart by gathering and internalizing sales knowledge as fast as possible to move to the higher end professional knowledge and skill you will need to be successful.

Think about it, if you were a new doctor, which would you rather have early on?

- ◆ someone telling you how to take out an appendix, how to set a broken bone, or how to take someone's blood pressure, or
- ◆ in-depth knowledge of the human body, the systems of the body, and an understanding of definitions and terminology, so you can think on your feet, make better decisions, and create new and improved methods for helping people?

A lot of what has been missing in professional selling has to do with the lack of a body of knowledge—in effect, the equivalent of *Gray's Anatomy* for the world of selling. In other words, many salespeople don't read books that will help them make the transition to trusted advisor and sales professional. Many salespeople haven't read books that define what selling is and provide a framework and structure for all the literature, tapes, and seminar content they will encounter. While this book doesn't go quite that far, you may notice that selling is more complicated than you thought—or, worse yet, than your organization believes.

*10 Steps to Successful Sales* is different from other sales books in other ways as well:

- ◆ This book tackles the task of explaining what selling is, providing both a broad definition and framework for the profession as well as a no-holds-barred realistic overview of what people entering the profession can expect, what they need to prepare for, and what others are likely to be doing.
- ◆ It is longer than most sales texts because I've attempted to define what selling entails in the broadest sense to establish a framework.
- ◆ It contains very little on *how* to sell. Except for Steps 5 and 7, most of this book presents information that isn't taught in most colleges or universities and isn't addressed in most sales training courses.
- ◆ It is not written in a style designed to be cute, flippant, or attention grabbing. I don't believe many of the perceptions floating around the business community—that salespeople

can't sit still for long periods of time, salespeople can't stay focused on one topic for a long time, or salespeople require a book that is chock full of pictures, jokes, or cartoons in order to get the point—I just don't believe it.

- ◆ Each chapter is written to be able to stand on its own, making *10 Steps* a great desk reference, dialogue starter, or textbook for a college class.

I have organized *10 Steps to Successful Sales* around helping you to become an effective and efficient trusted advisor. The content is derived from my own personal experiences as a top-performing, award-winning sales professional, as well as my doctoral research, interviews with hundreds of salespeople and managers, and my experiences training thousands of salespeople across the globe. More important, I don't want you to just take my word for it. I have also included the sage advice of nearly 100 "gurus" who have worked hard to personally evolve from salesperson to sales professional. They have graciously offered their words of wisdom to help you learn how to become a sales professional.

*10 Steps to Successful Sales* is part of the ASTD Press *10 Step* series and was written to provide you with a proven process, quick reference checklists, and tips to succeed in the sales profession regardless of the product or services in your portfolio. I hope the tips and tools contained in this book will guide you each step of the way in prospecting, presenting, following, and developing long-lasting relationships. More important, I hope this book helps you make the transition from salesperson to sales professional.



I would like to thank the "gurus" who contributed their quotes to help bring this book to life. I hope their words will inspire you to work hard and evolve from salesperson to sales professional. I would like to thank the team at ASTD Press for their professionalism and support in writing this book, as well as Lynn Sparapany Lewis, for her thoughtful advice, helpful critique, and valuable copy review and editing. Special thanks to Gerhard Gschwandtner of *Selling Power* magazine and Dave Stein of ESRResearch Group, for being

mentors and true supporters of sales professionalism. A heartfelt “thank you” to Eric Kerkhoff and Tim Ohai, for helping me find the best way to articulate the principles and universal truths that cut across all sales situations and all vertical markets, representing all types of selling strategies. And thanks to my loving family, for supporting me in my lifelong quest to advance the sales profession.

I hope you enjoy learning what you need to know and what you need to do to be an effective and efficient trusted business advisor through the *10 Steps to Successful Sales*.

To Your Success!

*Brian Lambert, PhD*

Author, Trainer, and Sales Professional



# I N T R O D U C T I O N

The business world today, and more specifically the marketing and selling worlds, can be summed up in one word—change. As organizations fight to grow profits, maximize shareholder value, and align internal marketing and selling processes to customer needs, the role of today's sales professional is undergoing a major transformation. This transformation is happening because sales professionals must cope with changing expectations, constantly evolving products and services, and an increased responsibility to drive top-line revenue results. At the same time, new and experienced sales professionals alike are facing tough challenges when it comes to building their careers, advancing their professional standing, or rising above the competition. That's where this book comes in: A redefined formula for salesperson success and professional advancement has now emerged.

Here's the reality. The formula for success in selling today cannot be boiled down into simplistic clichés. Success in selling requires delivery of value—that's it. But, obviously this is easier said than done. From the management of your own organization to building personal relationships on a foundation of trust, you must be able to achieve results quickly while bringing relevant skills to fray so you can begin making an impact quickly.

## The Real First Step

While this book has taken a 10-step approach to sales success that begins with embracing a sales mindset on page 3, you will get even greater value by reading and working through the two appendices located in the back of the book. *Introduction to the World of Selling*, Appendix A, sets the context for selling in today's changing environment. You will find a brief, valuable history of the profession and what is different about selling today, as well as new customer and CEO expectations. Start here if you are curious about learning from those who have come before you.

Appendix B, *Top Ten Myths of Selling*, offers both stereotype-busting advice and solid tips that will help you apply the 10 steps to become a successful sales professional. Start here if you're not quite sure of what you're getting into. The myths may surprise you!

These appendix chapters will be noted, and in some cases referenced, as you read the book, but I recommend you spend a little time with this valuable material before diving into the book.

Success in selling requires a fine balance. It requires a balance between art and science—between skill and intuition. To get it right, you have to engage in a process of self-discovery, self-awareness, and professional exploration—and this book will help you begin the process of continuous improvement.

Professional selling is not as simple as completing the transfer of products or services to a buyer. There are decisions to be made, conversations to have, and knowledge to gain. On one hand, there are individual buying decisions; on the other hand, there are organizational processes. The science involves following sound sales processes—that is, identifying and following the tactical and strategic processes that increase the probability of selling a product or service to a person or group of people. Sales processes are composed of methodologies or approaches that increase the chance of closing a sale. As part of this process, you must determine who the

target buyers are, assess client needs, and determine which products or services will help your client capitalize on a business opportunity or solve a specific problem. But processes are embedded within the system required to sell, and this system is composed of strategies, tools, and innovation. That's why this book offers much more than other books—you'll learn about the systems approach necessary for success from the very beginning, so you can build momentum, increase sales velocity, and increase your capacity to sell.

Just remember, an overreliance on many of today's published sales processes and sales funnels can be detrimental. It's just not as simple as following a nicely packaged, rote process funnel. While the sales processes and funnels may look great on paper, it's just one tool you need to be successful. You have to be a creative and strategic thinker who is able to harness knowledge, make plans, organize workflow, and set priorities. In other words, you must learn to use the complexity around you. A sales process can help, but it's just a start.

The art of selling requires you to achieve the level of trusted advisor—a competent sales professional with the expertise to clearly articulate product and service benefits while effectively educating the buyer so he or she can make a well-informed decision. This requires listening and communication skills, negotiation, energy, enthusiasm, ambition, relationship building, honesty, integrity, ethics, credibility, initiative, self-awareness, adaptability, and—most important—trust.

This book, *10 Steps to Successful Sales*, provides a framework you can use to understand the art and science of selling. It will help you understand two often overlooked questions for new salespeople: “*What do I need to know?*” and “*What do I need to do?*” Remember these two questions because they exemplify the competencies of most successful sales professionals, and they help you build critical momentum in any job that involves persuasion and influence.

As you begin exploring the complexities of selling, it is easy to get caught up in the complexity around you. No matter what your experience level or where you are in your career, in these pages you will find proven techniques and tips to help you succeed in becoming a sales professional.

In particular, you will learn how to

- ◆ develop the right sales mindset and assess your strengths and weaknesses
- ◆ explain the five buckets of key information that all sales professionals need to know
- ◆ identify the five reasons why people buy
- ◆ share the habits of successful salespeople
- ◆ describe five levels of effectiveness known as the “Universal Sales Truths”
- ◆ demystify the myths of selling
- ◆ determine where you are with prospects and clients in the sales process
- ◆ provide strategies to sharpen verbal and nonverbal communication skills, including listening skills and questioning techniques
- ◆ define the seven roles of highly competent sales professionals
- ◆ effectively set and manage expectations with internal teams and external clients.

## Structure of This Book

No matter what industry you serve or job title you hold, you will find that each section describes one of the 10 specific steps necessary for accomplishing the goal of moving you from sales “person” to sales “professional.” To get there, you need to embrace an approach that helps you become an effective and efficient trusted advisor. For that reason, this book is divided into three main sections that focus on

- ◆ **Effectiveness**—defined as something that is adequate to accomplish a purpose or something that produces the intended or expected result. Simply put, sales effectiveness

is about accomplishing set goals. You'll learn this valuable skill in this section.

- ◆ **Efficiency**—defined as competency in performance. Sales efficiency is about getting things done and can be improved by meeting the buyer where they are at, following a standard sales process, and creating your own personal sales system. You'll learn the keys to efficiency in this section.
- ◆ **Becoming a trusted advisor**—a trusted advisor is someone who is customer focused and is therefore respected and trusted by clients and customers. You'll learn how to take what you've learned and apply it in this section.

The book is also divided into chapters by the key step they discuss and illuminate. As discussed earlier, the appendixes, along with the free bonus materials located at [www.10stepstosales.com/bonuses](http://www.10stepstosales.com/bonuses), also play an important part in ensuring your transformation into a successful selling professional. And you may wish to start there.

## Section 1: How to Be Effective

- ◆ **Step 1: Embrace a Sales Mindset.** Selling is not simply about encouraging a customer to buy a product or service. It is also about listening, analyzing, problem solving, and persuading. Selling is conversation and communication in order to become a trusted advisor. This chapter focuses on striving for accountability, objectively determining your strengths and weaknesses, understanding your personal selling style, relating actions to personal outputs, and mastering the Continuous Selling Improvement Cycle, as well as highlights the importance of understanding your role in relation to the buyer and how to become a more competent sales professional by optimizing your strengths.
- ◆ **Step 2: Know Your Job and Your Role.** When starting any new job, it is important to understand exactly what is expected so that you can meet or exceed the expectations. Oftentimes, these expectations are not explicit and are nearly impossible to achieve because measures and

benchmarks are vague or nonexistent. This chapter focuses on the four key benefits of the sales profession, how organizations define sales strategies and market segmentation, and the seven functions of any sales job.

- ◆ **Step 3: Develop Winning Habits.** Every successful sales professional has mastered habits—most of which were learned on the job. Small and consistent changes in your activities can have a significant impact on productivity. This chapter focuses on examining the activities that add value and increase productivity so you can determine how to appropriately allocate your time. In particular, this chapter delves into defining your quota, building a pipeline, determining your priorities, and executing your plan of action.

## Section 2: How to Be Efficient

- ◆ **Step 4: Understand the Buying Process.** Understanding how clients buy services or products can make or break your sales pipeline. It isn't enough to know how to market and sell; you have to understand how your clients buy. This chapter reviews the buying process, how customers define value, who influences the buying decisions in an organization, and negotiating strategies for closing the deal.
- ◆ **Step 5: Leverage the Sales Process.** Understanding the *buying* process is only half of the equation; understanding the *selling* process is equally important because it enables you to customize to meet your own personal needs. This chapter details a seven-part sales process, describes the outputs, and provides strategies to help you master each part of the process.
- ◆ **Step 6: Create Your Own Personal Selling System.** To maximize efficiency and make your own success, you need to use your knowledge to customize the buying and selling processes to create your own personal selling system. This step is important in becoming a successful sales professional because it focuses your attention on the

buyer's particular situation and enables you to ask the right questions, offer the right solution, and manage the complexity of the buyer-seller relationship.

### Section 3: How to Become a Trusted Advisor

- ◆ **Step 7: Accelerate Revenue.** Becoming a trusted advisor involves a team all rowing in the same direction. Without organizational support, your own company can become the biggest barrier in your selling success. This chapter discusses the many roles involved in a sales professional's job, as well as how to effectively manage expectations both internally with your manager and externally with your clients.
- ◆ **Step 8: Communicate Effectively.** Salespeople spend most of their time communicating, and often the content of their communication is highly repetitive. This repetition can lead to communicating without really thinking about the quality of the communication. Understanding all facets of communication can propel average salespeople to the top of the sales rankings—and this chapter focuses on the key concepts and tips to help get you there, including minimizing noise, polishing your questioning techniques, and mastering verbal and nonverbal communication skills.
- ◆ **Step 9: Manage Your Sales Organization.** Sales professionals have accountability and responsibility for driving revenue and must excel at the many roles they play within the buyer-seller relationship. In this step, sales professionals need to maximize their time investment, effectively run productive meetings, and skillfully maneuver within the sales culture of their organizations.
- ◆ **Step 10: Develop World-Class Sales Competency.** The most successful sales professionals are passionate about lifelong learning and never rest on their laurels or skills—instead, they continually focus on improving themselves and developing knowledge and skills. This chapter defines sales competencies and discusses strategies for closing sales and protecting your accounts.

Review these 10 steps as often as needed to help you transition from salesperson to sales professional and attain trusted advisor status with your clients.

## Additional Value: Sales Gurus and Worksheets

Interwoven throughout the book you'll see quotes from real-world "gurus" who offer their sage advice and best tips. These sales professionals serve as guides on your journey throughout the process.

Worksheets at the end of each step will help you apply the key concepts discussed, such as defining what success means to you, revisiting your beliefs about the sales profession, identifying the actions you should take when applying the Continuous Sales Improvement Cycle, and more.

## OVERVIEW

# How to Be Effective

**T**o get off to a quick start you must have focus and take action quickly. Your ability to accomplish the right tasks at the right time will allow you to make an impact quickly. And your ability to know where you are and (more important) know what you need to accomplish next are keys to becoming a world-class sales professional. This requires you to master the art of sales effectiveness.

Sales effectiveness is defined as something that is adequate to accomplish a purpose or something that produces the intended or expected result. Simply put, sales effectiveness is about accomplishing set goals. It is gained by knowing *what you need to do*. This level of understanding comes from

- ◆ Step 1: Embrace a Sales Mindset
- ◆ Step 2: Know Your Job and Your Role
- ◆ Step 3: Develop Winning Habits

**A Sales Professional is an effective and efficient trusted advisor.**



# Embrace a Sales Mindset

OVERVIEW

Know and embrace your responsibility

Constantly take inventory

Understand your personal selling style

Produce the right results

Understand the continuous improvement cycle

I am very interested in helping you become a better sales professional quickly. I don't want you to become a sales professional 20 years from now—I want you to become a sales professional as soon as you're ready. Many sales

managers I talk to realize that there is a difference between a salesperson and a sales professional. Sales *people* attempt to study sales closing techniques and sale steps, but sales *professionals* don't stop there. They continue to study the science of selling. How do you know when you are a sales professional? Your customers tell you and they treat you like one!

Selling is not simply about encouraging someone to buy a product or service; it is also about listening, analyzing, problem solving, and persuasion. Selling is about valuable conversations and relevant communications designed to help you move the sales process forward by becoming a trusted advisor.

Did you know that the word *sell* is derived from the Icelandic word *selja* and the Anglo Saxon word *syllan*—both of these mean “to serve” or “to give”? Sales professionals often recommend solutions

that will ultimately help organizations and individuals become more successful and achieve their goals. Therefore, as a sales professional, you must realize that you have a large amount of responsibility and accountability for your actions.

**A sales professional is an effective and efficient trusted advisor.**

Professional actions and outputs help you focus on one aspect of becoming a world-class sales professional—sales effectiveness.

Simply put, sales effectiveness is about accomplishing set goals. Sales effectiveness is gained by knowing *what you need to do*. This level of understanding comes from:

- ◆ embracing a sales mindset
- ◆ knowing your job
- ◆ developing winning habits.

## Know Your Responsibility

No matter how you look at it, you have a huge responsibility to live up to. Your success is ultimately your company's success. And as you

embrace that responsibility, you'll have more support and more power internally (with your organization) and externally (with your customers). As your level of responsibility and involvement in your company increases, you will have greater opportunities to co-create more complex solutions with more and more customers. This means you will develop a substantial amount of experience and expertise, which are needed to drive *even more* revenue. In other words, you must keep increasing your performance, you must continue to build your client base, and you must continuously improve over the long term. I have

### POINTER

Diagnosing the customer's needs before launching into a soliloquy about yourself or your firm's scope is crucial to properly positioning your product or service. Approaching the sales process with this mindset will arm you with a patience and curiosity that will separate you from the competition.

– Brian Dunn, Director of Business Development, OPTIMBUY Consulting

met salespeople who think they “know everything”—but they stop being effective, their customers’ knowledge becomes greater than their own knowledge, and they usually find themselves unhappy with their occupation. Don’t let that happen to you!

As a sales professional, you could be responsible for the development and implementation of selling strategies for specific brands or you could support a number of key strategic accounts in a focused manner. Typically new sales professionals, depending on experience, start with accounts that are “less complex.” With this type of customer, your organization is saying, “If we lose one of these accounts because the salesperson screws up, it is OK.” Initial assignments typically include the implementation of selling strategies that allow you to build competency. Over time, you will gain more exposure and responsibility with larger customers and you will participate in strategy development as well as strategy implementation—besides just tactical selling. You just have to pay your dues first.

## Embrace Your Accountability

With increased responsibility comes accountability. You must first build a bridge of accountability by being trustworthy and possessing professional expertise and poise. In other words, the best way to be accountable is to increase your knowledge and skill. Accountable salespeople are characterized by trustworthiness, integrity, and competency. Competency is built through accountability for your actions, accountability with your customers, and accountability with your own company.

Responsibility and accountability lead to effectiveness. And your effectiveness is judged based upon your behavior and your overall impact on the success of your organization. Goal

### POINTER

Always ask first before you tell. After all, people buy for their reasons, not yours.

– Jake Atwood, President, Ovation Sales Group

setting, performance management, attention to detail, and team-building skills provide the foundation of effectiveness, while taking initiative, inspiring, setting an example, delegating, coaching, creating, learning, coordinating, and acting strategically are demonstrable aspects of effectiveness.

## Constantly Take Inventory

To become a top sales performer, you must start by knowing yourself. This helps you to “serve” or “give” your talents to clients in return for a transaction. No matter how long you’ve been in the profession, it is important to periodically assess the type of salesperson you currently are and who you want to become. Even if you don’t have it all figured out, it’s important to keep looking at yourself in the mirror.

In professional selling, there are many indicators of how good you are. Most of those indicators have to do with numbers. This is because the amount of revenue you bring to a company can be easily quantified. However, to be a successful seller, you should strive to emulate or improve your actions, as well as maximize your own strengths and minimize any weaknesses.

To do this means that you need to objectively determine:

- ◆ What results am I currently achieving?
- ◆ What results are desired of me?
- ◆ How large is the gap between my current performance and my expected performance?
- ◆ What is the impact of that gap on me, on my employer, and on others?

If there is a gap in performance, then the goal is to clearly understand why the gap exists. Perhaps you don’t have the right information, support, or time/ability to perform all of the work that needs to be done. At times, the “rewards” in place do not provide the proper incentives. These are all examples of “external factors” that cause the performance gap—all of which are outside of your

control (and are usually the purview of the management team).

How do you close the controllable gap in performance? You focus on honing your competence—your knowledge, skills, and abilities in becoming a trusted advisor.

Think about a time when you bought something very valuable. What was the role of the salesperson in that buying experience? Was he or she a salesperson or a sales professional in your opinion? If you have had the opportunity to meet great sales professionals, what did you observe about them? What behaviors did they embody that you should strive for? In general, the behaviors of great sales professionals can serve as a guide for you and may include

- ◆ honesty
- ◆ ethical standards
- ◆ integrity
- ◆ ability to build trust
- ◆ credibility
- ◆ effective time management
- ◆ in-depth product knowledge
- ◆ competitor knowledge
- ◆ passion for lifelong learning.

For example, sales professionals who are honest and ethical can build trust with their customers quickly. But there is a balance. Because sales professionals are more honest and ethical in their approach, they may be perceived (by other salespeople) as not making sales happen as quickly as they should (which is probably a misperception of what is really true). Remember, not only do honesty and integrity build trust and net long-term customers, but they also go a long way in smoothing over issues or situations when hiccups occur. Clients who truly like their salespeople and view them as

## POINTER

Your customer's customer is your customer too. Help them increase their sales and they will increase yours.

– Antoine Loup, *International Sales and Information Systems, Insulating Coatings Corporation*

professional are often much more willing to work through issues rather than bail on the relationship at the first bump in the road.

## Understand Your Personal Selling Style

When I talk with new salespeople, I often ask them about their selling style. Their answers usually involve their understanding of the product, technical aspects of their service, their awareness of the industry, or their overall understanding of the profession. While it's true that selling style is influenced by the knowledge you gain, it also involves your values, personality traits, and motivations. Understanding your personal style is important. But it's how you use your personal selling style that really matters.

For example, John is a salesperson who values money and the need for achievement. As a result, his style drives him to want to "make the sale" or win an award. In contrast, Sue's selling style is more introspective and analytical. As a result, her style may lead her to a different type of sale that is more complex and requires more buyer education. Think about the type of seller you are, and understand the best sales job for you. There are sales positions out there that will fit your specific style!

### **Know Your Sales Style**

One key component of your sales style is your personality type. You can identify your personality type and traits through various types of tests, such as the Myers-Briggs Type Indicator, which can help you understand what makes you tick and may define the type of sales job that best suits your interests and innate competencies.

For example, if you

- ◆ require immediate satisfaction and gratification, then product-oriented selling may be right for you.
- ◆ are a "system thinker" and analytical, then complex solution selling across the entire organization may be right for you.
- ◆ like building relationships and relating to people, you might want to consider more of a "farmer" role within existing accounts as opposed to the "hunter" role that requires you to dig up new business.

What is it that great salespeople know and do that makes them successful? The key begins with what great salespeople know about themselves. To start, great salespeople understand that

- ◆ their inner thoughts affect their behavior—particularly when selling.
- ◆ they should behave in a professional manner even when under stress and in situations that might illicit unproductive behavior.
- ◆ their outward personalities impact their communications and selling approaches with their customers.
- ◆ how their customers perceive them—both positively and negatively—will impact their effectiveness.
- ◆ they may need to adjust their styles to sell more effectively to customers with similar or different styles.

Great sales professionals also maintain a positive mental attitude no matter what comes their way. They view client objections as an opportunity to continue discussions and further educate clients on why their products and services are the best solution to meet their business needs.

Regardless of what type of selling style you exhibit, a fundamental take away in developing your sales mindset involves selling *your own* way to maximize *your* strengths. For example, if you are analytical, then sell with a more analytical approach. You don't have to come outside of your comfort zone to be successful in the sales profession.

## Produce the Right Results

No matter what selling style you have, you must “fit the mold” of a sales professional. While all sales professionals have accountability, responsibility, and a personal style, they also possess the ability to align their activity to get the job done. They never seem to forget that the definition of success is the ability to drive results.

Now this may seem obvious, but results don't “just happen.” If sales results were easy, then more people would be willing to become salespeople. Experienced sales professionals produce results

Consistency, consistency, consistency. The cornerstone to any successful sales career is to apply what you've learned and be consistent about it.

Visit your clients or prospects regularly. Follow up regularly and respond with a sense of urgency always.

– Michael J. Telesky,  
Senior Sales Executive,  
United Healthcare  
Specialty Benefits

and outputs that are different from an entry-level salesperson for several reasons. Understanding that you need to produce results and outputs will help you become a more trusted advisor with your colleagues and customers.

For example, experienced sales professionals are able to adapt better, think on their feet quicker, and be creative because they realize their actions lead to results. The more focused and appropriate the action, the better the result. Further, experienced sales professionals understand that there is an

intermediate dynamic *between* their actions and results: that is, outputs. Outputs, whether tangible or intangible, are what successful salespeople produce or provide to colleagues, customers, and clients.

Figure 1.1 shows how actions relate to personal outputs and sales results.

What actions, outputs, and results distinguish great sales professionals?

**Actions** (observable behaviors):

- ◆ follow a written sales plan
- ◆ take responsibility for their own actions
- ◆ define and follow a personalized sales process that means something to them

## FIGURE 1.1

### How Results Are Achieved

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- ◆ consistently and effectively prospect in the most appropriate manner
- ◆ reach the appropriate decision maker
- ◆ listen effectively
- ◆ use questions effectively
- ◆ bond and build rapport with others
- ◆ uncover hidden or latent needs and budgets
- ◆ display a strong desire for success
- ◆ display unwavering commitment to do what it takes
- ◆ are positive in relationships with others
- ◆ cultivate a positive and optimistic outlook
- ◆ possess a strong sense of self-confidence
- ◆ understand personal beliefs and values
- ◆ control emotions
- ◆ do not need approval from others
- ◆ handle rejection from others
- ◆ are able to talk about business and the financial arrangements of a deal

**Outputs** (something tangible or intangible that is produced or provided to others):

- ◆ produce sales results
- ◆ produce proposals or quotes that are well thought out
- ◆ provide accurate forecasts of deals pending
- ◆ produce written goals

**Results** (measurable or quantifiable outcomes):

- ◆ achieve quotas
- ◆ get commitments and decisions
- ◆ develop strong relationships with clients and customers
- ◆ garner respect of colleagues and peers

## Continuously Improve

One of the traits of successful sales professionals is a passion for continuous improvement and learning. The *Continuous Sales Improvement Cycle* (CSIC) is a methodology I have used for 15 years. This approach

helped me understand my role in relation to the buyer and become a more competent salesperson by understanding my strengths and weaknesses. I used the CSIC for everything from diagnosing weaknesses in my approach to crafting and co-creating customer solutions. I even used it to help my customers overcome their unique challenges.

To improve constantly, you need a way to repeatedly examine strengths and weaknesses, enable a change in your performance gap, and take the appropriate action to help close the gap. The CSIC is an effective tool to do just that. As shown in Figure 1.2, the CSIC has five phases and can be remembered as the “5Es”:

**Phase 1: Explore**—In this phase, the goal is to explore a situation from every possible angle. It is important that you separate yourself and think strategically and tactically about the problem, challenge, solution, process, or project. No matter what you are exploring, you will need to clearly assess your strengths, weaknesses, and opportunities.

**Phase 2: Examine**—In this phase, the goal is to examine the specific need you’re trying to meet. You must work hard to clearly and specifically identify what strategic or tactical problem needs to be solved and align your work and results to fill clearly identified gaps. It is helpful to have a written plan that documents your intended course of action. Remember to focus on what outputs or results you need to achieve and document the tools, resources, strategies, and actions you will use.

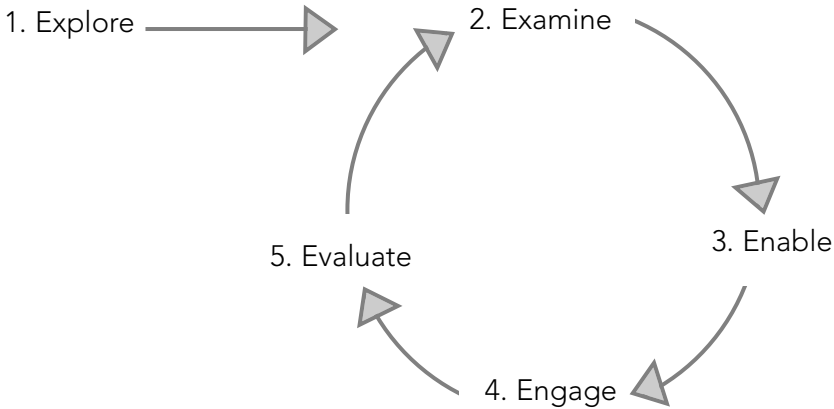
**Phase 3: Enable**—In this phase, the goal is to enable your plan from the previous step and think about what it will take to put it into action. While the plan may look flawless on paper, rarely does it ever roll out in the manner that was intended (think of a standard sales process!). Brainstorm as many different scenarios as possible.

**Phase 4: Engage**—In this phase, the goal is to actively pursue your course of action. Here you complete tasks, finish processes, and meet your objectives. If things go awry, go back to the earlier phases and reengage the model (that’s why it is cyclical).

# FIGURE 1.2

## The Continuous Sales Improvement Cycle (CSIC)

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**Phase 5: Evaluate**—In this phase, the goal is to actively measure your progress and gather the feedback you need.

Note: This cycle is never over. It is meant to help you increase your agility in meeting organizational and market demands. As a result, you may need to reexamine, reenable, reengage, and reevaluate many times until you feel you have attained your objective.

### The CSIC in Action: How Buyers Buy and Sellers Sell

The CSIC can help define the stages that both buyers and sellers progress through during the selling and buying processes.

Let's first consider the view through the "lens" of a buyer. The buying organization will

1. *explore* their personal and organizational needs
2. *examine* the options

3. *enable* their plan (research, examine options, etc.)
4. *engage* in a decision with one (or several) selling organizations
5. *evaluate* their success with the purchase.

Now let's examine the sales perspective. All sales professionals (and their selling organizations) progress through the same elements when selling products or services. The selling organization will

1. *explore* the needs of potential buyers
2. *examine* the options of positioning against the need of the potential buyers
3. *enable* their plan (how they will sell, plans, and so on)
4. *engage* in a decision (engage in the marketplace)
5. *evaluate* their success with the sale.

Sales professionals using the CSIC model build a solid understanding of the profession because it offers a universally applicable approach to defining the buying and selling relationship. Obviously, though, this process does not end here. An all-encompassing view that drills down several levels deeper into the activities and framework of selling is found later in this book.

When starting any new job, it is important to understand exactly what is expected of you in order to meet or exceed the expectations. Oftentimes, these expectations are not explicit—meaning your goals may be loosely defined—and are nearly impossible to achieve since measures and benchmarks are vague or nonexistent. The next chapter

## POINTER

Don't give up until the prospect tells you to remove his number from your lists. People are busy and even if they want your product or service, the timing may not be right. Don't give up.  
– Steven Menconi,  
Regional Sales Director,  
A Choice Nanny

focuses on the four key benefits of the sales profession, how organizations define sales strategies and market segmentation, and the seven functions of any sales job. After you clearly understand your organization and your boss' expectations of you, the next step in the process involves developing winning habits to help you progress from a salesperson to a sales professional and trusted advisor.

# WORKSHEET 1.1

## Planning for Selling Success Leveraging the CSIC

When starting a new job or when new products are added to your portfolio, you will have many items and services to learn about. The same is true if your company is rolling out a new product and you need to understand how to sell the solution. Use this worksheet to apply the CSIC model to any new or existing product that you need to learn more about.

Phase	Your Actions
Phase 1: Explore	<p>What I need to do:</p> <ul style="list-style-type: none"><li>◆ List all the ways that this solution is designed to help fill specific needs.</li><li>◆ List the unique aspects of the industry(s) in which my solution can help.</li><li>◆ Brainstorm who can help me. Find out their job titles, what are their needs, etc.</li><li>◆ Think about what else is important for me to know.</li></ul> <p><i>Note: If you get stuck, ask your manager to help.</i></p>
Phase 2: Examine	<p>What I need to do:</p> <ul style="list-style-type: none"><li>◆ Find out what competitors are attempting to fill the same need.</li><li>◆ Discover what additional information I need and where can I get it in regard to products that buyers may be considering.</li><li>◆ Determine who else internally can help.</li><li>◆ What else is important for me to know?</li></ul> <p><i>Note: If you get stuck, ask your manager to help.</i></p>
Phase 3: Enable	<p>What I need to do:</p> <ul style="list-style-type: none"><li>◆ Create a unique selling proposition or “elevator pitch” about my solution.</li><li>◆ Create a sales presentation.</li><li>◆ Identify potential questions the buyer may have.</li><li>◆ Determine what else I need to do to prepare.</li></ul> <p><i>Note: If you get stuck, ask your manager to help.</i></p>
Phase 4: Engage	<p>What I need to do:</p> <ul style="list-style-type: none"><li>◆ Make a sales call.</li><li>◆ Create a proposal.</li><li>◆ Follow the sales process.</li><li>◆ Answer customer inquiries.</li><li>◆ Brainstorm additional actions in this phase.</li></ul> <p><i>Note: If you get stuck, ask your manager to help.</i></p>

*continued on next page*

