



explore, engage, execute, evaluate

Selling Skills

One Day Workshop

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Introduction

This handout accompanies the Professional Sales course and provides more detailed information on two contrasting selling styles.

The traditional approach to selling is explored in the Seven Steps to the Sale, and a more flexible approach is examined in the Open Plan/Strategic Selling section.

Both have something to offer. There is no right or wrong way to sell. What is important is to remember that people buy from people. Proposals and propositions are supposed to be answers and solutions to needs and problems.....so if we have not asked the right questions.....and genuinely listened to the response.....then we cannot expect to get the business.

Selling successfully does require a certain basic process and for the salesperson to go through a number of logical steps. It also requires good judgment, an assessment of how the individual customer likes to be sold to, and, if you are confident that you understand the needs, asking clearly for the business.

The workshop explores the processes and steps required and looks at a number of techniques that will help delegates to develop their own effective style.

Seven steps to the sale

The Seven Steps of the Sale is the most common traditional structure used for explaining and training the selling process for the sales call or meeting, including what immediately precedes and follows it. This structure is usually represented as the Seven Steps of the Sale.

This structure assumes that the appointment has been made, or in the instance of a cold-call, that the prospect has agreed to discuss things there and then. The process for appointment-making is a different one, which is shown later in this section. Aside from the questioning stage, this structure also applies to a sales visit which been arranged for the purpose of presenting products/services or a specific proposal following an invitation, earlier discussions or meetings. For these pre-arranged presentations it is assumed that the sales person has already been through the questioning stage at prior meetings.

The seven steps of the sale

1. **planning and/or preparation**
2. **introduction or opening**
3. **questioning**
4. **presentation**
5. **overcoming objections/negotiating**
6. **close or closing**
7. **after-sales follow-up**

the seven steps of the sale in summary

planning and preparation - the seven steps - 1

Generally, the larger the prospect organization, the more research you should do before any sales call at which you will be expected, or are likely, to present you company's products or services.

- ensure know your own product/service extremely well - especially features, advantages and benefits that will be relevant to the prospect you will be meeting
- ascertain as far as you can the main or unique perceived organizational benefit that your product or service would give to your prospect
- discover what current supply arrangements exist or are likely to exist for the product/service in question, and assess what the present supplier's reaction is likely to be if their business is at threat

- understand what other competitors are able and likely to offer, and which ones are being considered if any
- identify as many of the prospect organization's decision-makers and influencers as you can, and assess as much as far as you can what their needs, motives and relationships are
- try to get a feel for what the organizational politics are
- what are the prospect's organizational decision-making process and financial parameters (eg., budgets, year-end date)
- what are your prospect's strategic issues, aims, priorities and problems, or if you can't discover these pre-meeting, what are they generally for the market sector in which the prospect operates?
- prepare your opening statements and practice your sales presentation
- prepare your presentation in the format in which you are to give it (eg., MS Powerpoint slides for laptop or projected presentation) plus all materials, samples, hand-outs, brochures, etc., and always have spares - allow for more than the planned numbers as extra people often appear at the last minute
- prepare a checklist of questions or headings that will ensure you gather all the information you need from the meeting
- think carefully about what you want to get from the meeting and organise your planning to achieve it

introduction/opening - the seven steps - 2

- smile - be professional, and take confidence from the fact that you are well-prepared
- introduce yourself - first and last name, what your job is and the company you represent, and what the your company does (ensure this is orientated to appeal to the prospect's strategic issues)
- set the scene - explain the purpose of your visit, again orientate around your prospect not yourself, eg "I'd like to learn about your situation and priorities in this area, and then if appropriate, to explain how we (your own company) approach these issues. Then if there looks as though there might be some common ground, to agree how we could move to the next stage."
- ask how much time your prospect has and agree a time to finish
- ask if it's okay to take notes (it's polite to ask - also, all business information is potentially sensitive, and asking shows you realise this)
- ask if it's okay to start by asking a few questions or whether your prospect would prefer a quick overview of your own company first (this will depend on how strongly know and credible your own company is - if only a little you should plan to give a quick credibility-building overview in your introduction)

questioning - the seven steps - 3

- the main purpose of questioning is to confirm or discover the strongest or unique perceived organizational benefit that would accrue to the prospect from the product/service - it may be one (usually) or two (occasionally) or three (rarely) key things, which may be obvious to seller and buyer, or not obvious to either, in which case questioning expertise is critical
- questioning must also discover how best to develop the sale with the organization - how they decide, when, people and procedures involved, competitor pressures, etc.
- good empathic questioning also builds relationships, trust and rapport - nobody wants to buy anything from a sales person who's only interested in their own product or company - we all want to buy from somebody who gives the time and skill to interpreting and properly meeting our own personal needs
- you will have prepared a list of questions or headings - now use it
- use open questions to gather information - who, what, why, where, when, how
- use "can you tell me about how..." if you are with a senior contact - generally the more senior the contact, the bigger the open questions you can ask, and the more they will be comfortable and able to give you the information you need
- use "why?" to find out reasons and motives which often lie beneath the initial answers given
- listen carefully and empathically, maintain good eye-contact, understand, and show that you understand - especially understand what is meant and felt, not just what is said, particularly when you probe motives and personal aspects
- interpret and reflect back and confirm you have understood what is being explained, and if relevant the feelings behind it
- use closed questions to qualify and confirm your interpretation - a closed question is one that can be answered with a yes or no, eg., "Do you mean that when this type of equipment goes down then all production ceases?", or "Are you saying that if a new contract is not put in place by end-March then the existing one automatically renews for another year?"
- when you've asked a question, SHUT UP - do not interrupt
- your prospect should be doing 80-99% of the talking during this stage of the sales call; if you are talking for a third or half of the time you are not asking the right sort of questions
- do not jump onto an opportunity and start explaining how you can solve the problem until you have asked all your questions and gathered all the information you need (in any event never be seen to 'jump' onto any issue)

- all the time try to find out the strategic issues affected or implicated by the product/service in question - these are where the ultimate decision-making and buying motives lie.
- if during the questioning you think of a new important question to ask note it down or you'll forget it
- when you have all the information you need, acknowledge the fact and say thanks, then take a few moments to think about, discuss and summarise the key issues/requirements/priorities from your prospect's organizational (and personal if applicable) perspective

presentation - the seven steps - 4

- the sales presentation should focus on a central proposition, which should be the unique perceived benefit that the prospect gains from the product/service
- during the questioning phase the sales person will have refined the understanding (and ideally gained agreement) as to what this is - the presentation must now focus on 'matching' the benefits of the product with the needs of the prospect so that the prospect is entirely satisfied that the proposition
- the sales person therefore needs an excellent understanding of the many different organizational benefits that accrue to customers, and why, from the product/service - these perceived benefits will vary according to the type of customer organization (size, structure, market sector, strategy, general economic health, culture, etc)
- the sales presentation must demonstrate that the product/service meets the prospect's needs, priorities, constraints and motives, or the prospect will not even consider buying or moving to the next stage; this is why establishing the prospect's situation and priorities during the questioning phase is so vital
- the above point is especially important to consider when the sales person has to present on more than one occasion to different people or groups, who will each have different personal and organizational needs, and will therefore respond to different benefits (even though the central proposition and main perceived benefit remains constant)
- all sales presentations, whether impromptu (off the cuff) or the result of significant preparation, must be well structured, clear and concise, professionally delivered, and have lots of integrity - the quality and integrity of the presentation is always regarded as a direct indication as to the quality and integrity of the product/service
- it follows then that the sales person must avoid simply talking about technical features from the seller's point of view, without linking the features clearly to organizational context and benefit for the prospect - also avoid using any jargon which the prospect may not understand

- sales presentations must always meet the expectations of the listener in terms of the level of information and relevance to the prospect's own situation, which is another reason for proper preparation - a vague or poorly prepared sales presentation sticks out like a sore thumb, and it will be disowned immediately
- when presenting to influencers, which is necessary on occasions, it is important to recognise that the sales person is effectively asking the influencers to personally endorse the proposition and the credibility of the selling organization and the sales person, so the influencers' needs in these areas are actually part of the organizational needs of the prospect company
- the presentation must include relevant evidence of success, references from similar sectors and applications, facts and figures - all backing up the central proposition
- business decision-makers buy when they become satisfied that the decision will either make them money, or save them money or time; they also need to be certain that the new product/service will be sustainable and reliable; therefore the presentation must be convincing in these areas
- private consumer buyers ultimately buy for similar reasons, but for more personal ones as well, eg., image, security, ego, etc., which may need to feature in these type of presentations if they form part of the main perceived benefit
- while the presentation must always focus on the main perceived benefit, it is important to show that all the other incidental requirements and constraints are met - but do not over-emphasise or attempt to 'pile high' loads of incidental benefits as this simply detracts from the central proposition
- presentations should use the language and style of the audience - eg., technical people need technical evidence; sales and marketing people like to see flair and competitive advantage accruing for their own sales organization; managing directors and finance directors want clear, concise benefits to costs, profits and operating efficiency; and generally the more senior the contact, the less time you will have to make your point - no-nonsense, no frills, but plenty of relevant hard facts and evidence.
- if the sales person is required to present to a large group and in great depth, then it's extremely advisable to enlist the help of one or two suitably experienced colleagues, from the appropriate functions, eg., technical, customer service, distribution, etc., in which case the sales person must ensure that these people are properly briefed and prepared, and the prospect notified of their attendance.
- keep control of the presentation, but do so in a relaxed way; if you don't know the answer to a question don't waffle - say you don't know and promise to get back with an answer later, and make sure you do.

- never knock the competition - it undermines your credibility and integrity - don't even imply anything derogatory about the competition
- if appropriate issue notes, or a copy of your presentation
- use props and samples and demonstrations if relevant and helpful, and make sure it all works properly
- during the presentation seek feedback, confirmation and agreement as to the relevance of what you are saying, but don't be put off if people stay quiet
- invite questions at the end, and if you are comfortable, at the outset invite questions at any time - it depends on how confident you feel in controlling things
- whether presenting one-to-one or to a stern group, relax and be friendly - let your personality and natural enthusiasm shine through - people buy from people who love and have faith in their products and companies

overcoming objections/negotiating - the seven steps - 5

- decades ago it was assumed that at this stage lots of objections could appear, and this would tend to happen, because the selling process was more prescriptive, one-way, and less empathic; however, successful modern selling now demands more initial understanding from the sales person, even to get as far as presenting, so the need to overcome objections is not such a prevalent feature of the selling process
- nevertheless objections do arise, and they can often be handled constructively, which is the key
- if objections arise, firstly the sales person should qualify each one by reflecting back to the person who raised it, to establish the precise nature of the objection - "why do you say that?" is usually a good start
- it may be necessary to probe deeper to get to the real issue, by asking why to a series of answers - some objections result from misunderstandings, and some are used to veil other misgivings which the sales person needs to expose
- lots of objections are simply a request for more information, so definitely avoid responding by trying to re-sell the benefit - simply ask and probe instead; the best standard response is something like "I understand why that could be an issue, can I ask you to tell me more about why it is and what's important for you here?.."
- try to avoid altogether the use of the word 'but' - it's inherently confrontational
- an old-style technique was to reflect back the objection as a re-phrased question, but in a form that the sales person is confident of being able to answer positively, for example: the prospect says he thinks it's too expensive; the sales person reflects back: "I think what you're really saying is that you have no problem with giving us the contract, but you'd

- prefer the payments staged over three years rather than two? - well I think we could probably do something about that..."
- another old-style technique used to be to isolate the objection (confirm that other than that sticking point everything else was fine), then to overcome the objection by drawing up a list of pro's and con's, or analysing to death all the hidden costs of not going for the deal, or re-selling the benefits even harder, and then to close powerfully, but these days such a contrived approach to objection handling is likely to insult the prospect and blow the sales person's credibility
 - it is important to flush out all of the objections, and in so doing, the sales person is effectively isolating them as the only reasons why the prospect should not proceed, but then the more modern approach is to work with the prospect in first understanding what lies beneath each objection, and then working with the prospect to shape the proposition so that it fits more acceptably with what is required.
 - avoid head-to-head arguments - even if you win them you'll destroy the relationship you'll go no further - instead the sales person must enable a constructive discussion so that he and the prospect are both working at the problem together; provided the basic proposition is sound most objections are usually overcome by both the seller and the buyer adjusting their positions slightly; for large prospects and contracts this process can go on for weeks, which is why this is often more in the negotiating arena than objection handling
 - you've handled all the objections when you've covered everything that you've noted down - it's therefore important to keep notes and show that you're doing it
 - by this stage you may have seen some signs that the prospect is clearly visualising or imagining the sale proceeding, or even talking in terms of your working together as supplier and customer; this is sometimes called buying warmth. Certain questions and comments from prospects are described as buying signals because they indicate that the prospect may be visualising buying or having the product/service. In the old days, sales people were taught to respond to early buying signals with a 'trial close', but this widely perceived as clumsy and insulting nowadays. Instead respond to early buying signals (ie those received before you've completed the presentation to the prospect's satisfaction, and answered all possible queries) by asking why the question is important, and then by answering as helpfully as possible

close/closing - the seven steps - 6

- in modern selling, even using the traditional Seven Steps process, every sales person's aim should be to prepare and conduct the selling process so well that there are few if any objections, and no need for a close

- the best close these days is something like "Are you happy that we've covered everything and would you like to go ahead?", or simply "Would you like to go ahead?"
- in many cases, if the sales person conducts the sale properly, the prospect will close the deal himself, and this should be the another aim for the sales person - it's civilised, respectful, and actually implies and requires a high level of sales professionalism
- the manner in which a sale is concluded depends on the style of the decision-maker - watch out for the signs: no-nonsense high-achievers are likely to decide very quickly and may be a little irritated if you leave matters hanging after they've indicated they're happy; cautious technical people will want every detail covered and may need time to think, so don't push them, but do stay in touch and make sure they have all the information they need; very friendly types may actually say yes before they're ready, in which case you need to ensure that everything is suitably covered so nothing can rebound later
- for the record here are some closes from the bad old days - the traditional golden rule was always to shut up after asking a closing question, even if the silence became embarrassingly long - (a who-talks-first-loses kind of thing) - use them at your peril:
- the pen close: "Do you want to use your pen or mine?" (while producing the contract and pen)
- the alternative close: for example - "Would you like it delivered next Tuesday or next Friday?", or "We can do the T50 model in silver, and we have a T52 in white - which one would you prefer?"
- the challenge close: "I know most men wouldn't be able to buy something of this value without consulting their wives - do you need to get your wife's permission on this?.." or "Most business people in your position need to refer this kind of decision to their boss, do you need to refer it?"
- the ego close: "We generally find that only the people who appreciate and are prepared to pay for the best quality go for this service - I don't know how you feel about it?..."
- the negative close: "I'm sorry but due to the holidays we can't deliver in the three weeks after the 15th, so we can only do it next week, is that okay?"
- the guilt close: "Over three years it might seem a lot of money, but we find that most responsible people decide they simply have no choice but to go for it when it's less than a pound/dollar a day to protect your.../safeguard your..../improve your... (whatever)."
- the sympathy close: "I know you have some reservations that we can't overcome right now, but I've got to admit that I'm pretty desperate for this sale - my manager says he'll sack me if I don't get an order this week, and you're my last chance - I'd be ever so grateful if you'd go ahead - and I promise you we'd be able to sort out the extra features once I speak to

- our production people..." (How could anyone live with themselves using that one?....)
- the puppy dog close/puppy dog sale: "Let me leave it with you and you see how you get on with it..."
 - the last ditch close: (sales person packs case and goes to leave, but stops at the door) "Just one last thing - would you tell me where I went wrong - you see I just know this is right for you, and I feel almost guilty that I've not sold it to you properly, as if I've let you down....."
 - the pro's and con's list: "I can appreciate this is a tough decision - what normally works is to write down a list of all the pro's and con's - two separate columns - and then we can both see clearly if overall it's the right thing to do..."
 - the elimination close: "I can see I've not explained this properly - can we take a moment to go through all the benefits and see which one is holding us back from proceeding?" (At which the sales person lists all the benefits - the positives, and runs through each one to confirm it's not that one which is causing the problem, crossing a line through each as he goes. When he crosses the last one out he can claim that there really seems to be no reason for not going ahead...)

follow-up - the seven steps - 7

- after-sales follow-up depends on the type of product and service, but generally for every sale the sales person must carry out a number of important processes:
- all relevant paperwork must be completed and copies provided to the customer - paperwork will cover the processing of the order, the confirmation of the order and its details to the customer, possibly the completion of installation and delivery specification and instructions
- Sales reporting by the sales person is also necessary, generally on a pro-forma or computer screen, typically detailing the order value, product type and quantity, and details about the customer such as industrial sector - each sales organization stipulates the sales person's reporting requirements, and often these are linked to sales commissions and bonuses, etc.
- The sales person should also make follow-up contact with the customer - as often as necessary - to confirm that the customer is happy with the way the order is being progressed; this helps reduce possible confusion and misunderstood expectations, which are a big cause of customer dissatisfaction or order cancellation if left to fester unresolved
- Customer follow-up and problem resolution must always be the responsibility for the sales person, who should consider themselves the 'guardian' of that customer, even if a well-organised customer service exists for general after-sales care

- Customers rightly hold sales people responsible for what happens after the sale is made, and good conscientious follow-up will usually be rewarded with referrals to other customers
 - Follow-up is an important indicator of integrity; when a sales person makes a sale he is personally endorsing the product and the company, so ensuring that value and satisfaction are fulfilled is an integral part of the modern sales function
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The product offer

FAB's, USP's and UPB's (Features Advantages Benefits, Unique Selling Propositions/Points, and Unique Perceived Benefits)

The product offer, or sales proposition, is how the product or service is described and promoted to the customer. The product offer is what the sales person uses to attract attention and interest in verbal and written introductions to prospects - so it has to be concise and quick - remember that attention needs to be grabbed in less than five seconds. It's also used by the selling company in its various advertising and promotional material aimed at the target market. Traditionally the selling company's marketing department would formulate the product offer, but nowadays the sales person greatly improves his selling effectiveness if he able to refine and adapt the product offer (not the specification) for targeted sectors and individual major prospects.

Developing and tailoring a product offer, or proposition, is a vital part of the selling process, and the approach to this has changed over the years.

FAB's

The technique of linking features, advantages, and benefits (FAB's) was developed in the 1960's and it remains an important basic concept for successful selling and sales training. FAB's were traditionally identified and by the company and handed by the training department to the sales people, who rarely thought much about developing them.

Here is the principle of using Features, Advantages, Benefits:

Customers don't buy features, they don't even buy the advantages - what they buy is what the product's features and advantages will do for them, which in selling parlance is called the benefit.

For example: A TV might have the **feature** of internet connectivity and a remote control qwerty keyboard; the **advantage** is that the customer can now access and interchange internet and TV services using a single system; and the **benefit** is that the customer saves money, space, and a lot of time through not having to change from one piece of equipment to another.

It's the saving in money, space and hassle that the customer buys. A sales person who formulates a sales proposition or product offer around those benefits will sell far more Internet TV's than a sales person who simply sells 'TV's with internet connectivity and remote qwerty keypads'. In fact lots of customers won't

even have a clue as to what a 'TV with internet connectivity and remote qwerty keypad' is, particularly when it's packaged, branded and promoted as the latest 'WebTV XL520 with the new Netmaster GT500 Supa-consul'....

Moreover the few customers who recognise the product benefit by its features and advantages will also recognise all the competitors' products too, which will cause all the sales people selling features and advantages to converge on the most astute purchasing group, leaving the most lucrative uninformed prospects largely untouched.

The aim is to formulate a product offer which elegantly comprises enough of what the product does and how, with the most important or unique benefits for a given target market or prospect type.

USP's

The strongest benefit for a given target sector is often represented by the term USP, meaning unique selling point or proposition (for many companies no real uniqueness exists in their USP's, so the term is often used rather loosely where the word 'strongest' would be more apt). Real or perceived uniqueness is obviously very important because it generally causes a prospect to buy from one sales person or supplier as opposed to another. If there were umpteen WebTV's on the market, the ones that would sell the best would be those which had the strongest unique selling points.

Price is not a USP; sure, some people only buy the cheapest, but most do not; most will pay a little or a lot extra to get what they want. As with the example of the WebTV, an advantage that produces a money-saving benefit is different to straight-forward price discounting. A low price is not a benefit in this context, and any product that is marketed purely with a low-price USP will always be vulnerable to competition which offers proper user-related benefits, most of which may come in the form of a higher value, higher price package.

What makes it difficult to succeed all the time with a fixed USP or series of USP's is that one man's USP is another man's dead donkey - USP's by their nature fail to take account of a prospect's particular circumstances and detailed needs. The name itself - unique **selling** point - says it all. Purchasers of all sorts are more interested in **buying**, not being **sold to**.

Each type of prospect has different reasons for buying. Market sectors or prospect types with smaller houses and fewer rooms are more likely to respond to the space-saving benefit of the WebTV as the product's main USP. Market sectors or prospect types with big houses and lots of big rooms are more likely to regard the time-saving benefit as the key USP instead. A sector which comprises

people who are not technically competent or advanced, may well respond best to a USP that the supplier could fail to even mention, ie., installation, training and a free technical support hotline. Where does that leave the sales person if his marketing department hasn't included that one on the list?..

UPB's

This leads us to the UPB, meaning unique perceived benefit - a modern selling concept which has naturally evolved from FAB's and USP's.

A UPB is essentially a customer-orientated product offer.

The problem with USP's and FAB's is that they are largely formulated from the seller's perspective; they stem from product features after all. So if instead of looking at the product from the seller's viewpoint, we look at **the need, from the customer's viewpoint**, we can build up a UPB-based product offer that fits the prospect's situation and motives much better than any list of arbitrary FAB's and USP's.

First it comes down to knowing the target market segment, or the targeted prospect type, extremely well. This implies that we should first decide which sectors or segments to target, and it also shows why the planning and preparation stage in the selling process is far more significant and influential than it ever used to be.

Each targeted segment or prospect type has its own particular needs and constraints, and these combine to create the prospect's or target sector's very specific buying motive. So if we can identify and then formulate a unique perceived benefit to meet or match a known or researched sector's specific buying motive, we can create a very well-fitting and easily recognisable product offer indeed.

For instance, a likely attractive target sector for the WebTV could be families with limited space and little technical confidence. With children at school learning how to use computers, their parents (the decision-makers) would likely be interested in improving their children's access to internet services at home, given no requirement for extra space, and in a way that didn't put pressure on their limited technical know-how at the time of installation and for ongoing support. If the package enabled the parents to upgrade their TV as well for not much more than the cost of a conventional TV, then we're certainly likely to get their attention and interest, and we're a short step away from creating some real desire. The UPB for this particular prospect type might look something like:

"You can now give your children important educational access to the Internet at home, if you know nothing about computers, and don't even have room for one."

The product offer above is described so that the prospect type in question identifies with it, and can immediately match it to his own situation. The WebTV's relevant benefits - ie., you save space and you don't need to spend time understanding the technicalities - have been translated to match exactly why we believe that the prospect might be motivated to consider buying it. The 'important educational' reference is an example of developing the UPB further, ie., that your children's education will be improved. The trade-off is that more words reduces impact and attention; only by using the UPB in various forms can we see what works best.

It's now clear to see the difference now between a basic technical feature ('a TV with internet connectivity and remote qwerty keypad) and an unique perceived benefit (your children will be better educated). The feature does nothing to attract the buyer; the UPB does a lot.

There's another important reason to use tailored perceived benefits, rather than focus on FAB's and unique selling points: it's easy for prospects to compare and put a price on what a product is (FAB's and even USP's), but it's very difficult to value a real UPB. This means that sales people who sell UPB's are far less prone to competitor threat.

Developing strong meaningful unique perceived benefits is not easy - it requires good insight and understanding of the prospect or sector to be approached, and a lot of thought, trial and error to arrive at something that works well.

Open plan selling/Strategic selling

The term Open Plan Selling was first coined by a wonderful and inspirational British business consultant and trainer, Stanley Guffogg, during the mid-1980's. His ideas and philosophies were many years ahead of their time, and they provide some of the bedrock for what is written here. Strategic selling is another description commonly used today to describe the same selling ideas and process.

Open plan selling is in many ways a completely different approach to the old prescriptive and relatively rigid Seven Steps of the Sale. Open plan selling is also more advanced than most consultative selling methods being practiced today, largely because of the strategic aspects of the open plan approach.

Open plan selling is especially suited to the business-to-business major accounts selling function - which is now the principle domain of the field-based sales person (because field-based sales people are very expensive people and low-value business can't recover their costs). However, the open plan selling principles - not the full-blooded structure - can and should be readily adapted for all other types of selling, including even telesales (selling by telephone).

In modern business-to-business selling, successful sales people and organizations provide a **tailored** product or service which delivers a **big measurable strategic improvement** to the customer's own businesses. This implies that the customer contact should be a strategic buyer - usually at least a director, or in a small company the finance director or CEO. Nobody lower in the organization has the necessary authority and budget.

The only way to develop tailored strategic offerings is by researching the market and understanding the customer's business, which means the sales person must understand business, and be comfortable talking at director level. When you do business at this strategic level you are at a higher level than your competitors, who are still selling ordinary products and services to middle managers and buyers without true authority. Strategic selling takes time - time to train sales people, and time for selling opportunities to be identified and researched.

The open plan or strategic selling process and summary below assumes a major account scenario, whose size and complexity let's say does not enable a sales proposal to be formulated at the first meeting.

For smaller-scale opportunities the middle stages numbers 4 to 7 are effectively compressed or leap-frogged so that the formulation of the proposal and its presentation happens at the first appointment (stage 3) or soon after it.

open plan selling process:

1. **research and plan - market sector, prospect, and decide initial approach**
2. **make the appointment**
3. **attend appointment to build rapport and credibility, gather information about business needs, aims and process, and develop/agree a project/product/service specification**
4. **agree survey/audit proposal (normally applicable)**
5. **carry out survey/audit (normally applicable)**
6. **write product/service proposal**
7. **present proposal**
8. **negotiate/refine/adapt/conclude agreement**
9. **oversee fulfilment/completion**
10. **feedback/review/maintain ongoing relationship**

open plan selling in summary:

research and plan - open plan selling - step 1

In open plan selling, research and planning is a very important part of the process. The bigger the prospect organization or potential sale, the more planning and preparation is required. Major accounts need extensive researching before any serious approach is made to begin dialogue with an influencer or decision-maker. This is to enable the sales person to decide on the best initial approach or opening proposition. Implicit in this is deciding what is likely to be the strongest perceived organizational benefit that could accrue from the product or service in question, as perceived by the person to be approached (different people have different personal and organizational views and priorities). Generally it is best to concentrate on one strong organizational benefit. A benefit-loaded 'catch-all' approach does not work, because it's impossible to make a strong impact while promoting lots of different points - people respond most to a single relevant point of interest.

Assuming a large account is being targeted, the sales person must acquire as much as reasonably possible of the following information about the prospect organization:

- the organization's size and shape (turnover, staff types and numbers, sites, management and corporate structure, subsidiaries and parent organization)

- strategy and trading situation (main business aims, issues, priorities, trends of business and sector, a profile of the organization's customers and competitors, and what the company considers important for its own customers)
- current and future demand, volume, scale for the product/service in question
- current supply arrangements and contract review dates
- decision-making process (who decides, on what basis, when and how)
- decision-makers and influencers (names, positions, responsibilities and locations)
- **the organization's strategic implications, threats and opportunities that the product/service in question affects or could affect (in terms of the organization's strategic aims, operating efficiency, product and service quality, staff reaction and attitudes, and particularly how the product/service in question affects or could affect the organization's own competitive strengths and added value to its own customers)**

The final point in bold is the really special part, and obviously requires a good insight into the prospect's business and market. The other information is what all good sales people will be trying to discover, but only the open plan sales person will look for the final point. The final point is absolutely pivotal to the open plan selling process. When the sales person moves the dialogue with the prospect into this area then the sale takes on a completely different complexion; it completely transcends and surpasses any benefits, USP's or UPB's, that other sales people might be discussing.

These days it's easier to research and plan for a sales call than it used to be, because of the wealth of information available in company brochures, websites and from the organization's own staff, notably in customer service, press relations, and from the relative openness of most organizations. Trade journals and trade associations are other useful information sources for building up a picture. Depending on the particular product or service, different people in the prospect organization will potentially be able to provide company-specific information about important matters such as contract review dates, purchasing procedures and authority, even sometimes very useful details of attitudes, politics, the styles of the key people, and their priorities.

With a sensitive approach it's often possible obtain the trust and co-operation of somebody in the prospect organization, so as to provide this information, particularly if the discussion is positioned as non-threatening, empathic and of some strategic potential for the prospect. The rules of AIDA apply even to this information gathering element alone.

The secretaries and personal assistants of the influencers and decision-makers are generally very helpful in providing information to sales people once an appointment has been made - assuming they are asked politely and given proper reason - because they know that a well-informed visitor is more likely to enable a productive meeting, thereby saving the boss's time. It's often worth approaching these people for information and guidance even prior to making the approach for an appointment. Again the justification needs to be sensitively and professionally positioned.

It's important to strike the right balance between researching prior to the first appointment, and researching during the first appointment. The sales person should take advantage of all information that is obtainable easily and leave the rest to be filled in at the first meeting - as a rule, prospects respect and respond well to a well-prepared approach because it shows professionalism, and allows a relevant and focused discussion. Conversely, a prospect responds poorly to a 'blind' approach because it suggests a lack of care and it usually produces a vague, ill-informed discussion, which wastes time.

A good technique for planning and research is to design a 'pro-forma' or checklist of items to be researched for new prospects. This template will be different for each sales organization and product and maybe sector, but once designed serves as a really useful tool, both to gather the right data and to provide the discipline for it to actually be done.

Here's a sample research and planning template:

organization name	
decision-makers, titles, locations, phone and address data	
influencers, titles, locations, phone and address data	
decision-making process information	
budgetary issues, inc financial year-end	
current supplier(s) and contracts	
volume and scale indicators (staff, sites, users, etc)	
special criteria (eg supplier accreditations)	
trading and strategic pointers	
the organization's strategic implications, threats and opportunities that are affected or potentially affected by the product/service in question (in terms of the organization's strategic aims, operating efficiency, product and service quality, staff reaction and attitudes, and particularly how the product/service in question affects or could affect the organization's own competitive strengths and added value to its own customers)	
other notes	

Having researched and gathered information from various sources, the sales person is better informed as to how and whom to approach in the prospect organization.

Generally the first serious approach should be made to a senior decision-maker, normally the finance director/ chief financial officer or the managing director/CEO. This is because only these people have the authority to make important strategic budgetary decisions in the organization; other managers simply work within prescribed budgets and strategies established by the FD/CEO.

There are other reasons for planning to make the approach at the highest strategic level:

If the sales person begins a sales dialogue with a non-decision-maker, it is very difficult to raise the contact to the necessary higher level afterwards. This is due to the perfectly normal psychology of politics and pecking-order in organizations. Everyone, when presented with a proposition which concerns their own area responsibility, by a person who reports to them, is prone to the initial "not invented here" reaction. The reaction of the recipient is largely dependent not on the nature of the proposal, but upon their relationship with the proposer.

The sales person's proposition should ideally be based on serious strategic implications and benefits, which will not typically match the motives of a lower-ranking influencer.

The sales person must avoid a situation developing where he is reliant upon someone in the prospect's organization having to 'sell' the proposition to a decision-maker on the sales person's behalf. This is because it rarely succeeds, not least due to the 'not-invented-here' reaction of higher ranking people in the prospect organization.

make the appointment - open plan selling - step 2

The most important rule about appointment-making is to sell the appointment and not the product. The sales person must never get drawn into having to sell the product or service, either in writing or on the phone, while trying to arrange an appointment. The sales person cannot sell without first understanding the real issues, and the real issues may not even be apparent at the first meeting, let alone before even making an appointment.

Appointment-making is a skill in its own right. Some selling organizations use canvassers or telemarketing staff to do this for the sales person, but for large prospects it's useful for the sales person to combine the appointment-making with the initial researching activity. When combined in this way it helps to build

initial relationships with helpful people in the prospect organization, and the sales person can collect additional useful information that would otherwise be missed or not passed on by a separate appointment-maker or canvasser.

Introductory letters are a useful and often essential requirement before an appointment can be made. Generally the larger the prospect organization, then the more essential an introductory letter will be. This is mainly because pa's and secretaries almost always suggest that any approach to a decision-maker (ie the boss, whose time the secretary is protecting) be put in writing first. It's simply an expected part of the process by which credibility and level of interest is assessed by the prospect.

Remember AIDA - it applies to the appointment-making process as well. The aim is the appointment not the sale. When telephoning for an appointment, with or without a prior letter, the sales person typically must first speak to a switchboard operator or receptionist, then be put through to the targeted person's secretary or pa.

Bear in mind that the pa is there as a defence for the boss, and rightly so, or the boss would never get anything done. So for any approach to succeed in getting through to the boss, the pa must effectively endorse its credibility. Whether by writing or telephoning, the reason for wanting to meet must be serious and interesting enough, which is why researching and understanding the organization's strategic priorities are so crucial. Generic product and service approaches do not work because they are not seen to relate or benefit the prospect's own strategic priorities.

A carefully thought-through UPB (unique perceived benefit) forms the basis of the appointment approach. If it strikes the right chord the appointment will be granted. A good introductory letter may win an appointment without the need even to speak to the decision-maker. Imagine what happens: the letter is received by the pa. If it looks interesting and credible and worthy, the pa will show it to the boss. If the boss is interested, and in the event that the pa keeps the boss's diary (as is often the case), the boss often instructs the pa to make an appointment when the phone call from the sales person is received.

Calling early or late in the day, or at lunchtimes, often enables the sales person to circumvent the pa, but generally it's best to work with secretaries and pa's; they are usually extremely capable and knowledgeable people. They can be immensely helpful, so it's best to work with them and certainly not to alienate them.

In modern appointment-making, calling out of normal hours is advisable only in instances where both pa and boss are extremely difficult to reach during normal working hours.

The sales person's attitude towards the pa is very important. Imagine a pa who has taken a dislike to a pushy arrogant sales person - even if the approach is enormously well researched, relevant and appealing, the pa will for certain tell the boss about the sales person's attitude, and it is virtually inconceivable for the boss then to agree to an appointment. The sales person should always assume that the loyalty and mutual trust between boss and pa are strong. Most pa's can exert positive influence too; some will even make appointments for the boss with little reference to the boss, so there are lots of reasons for a sales person to make a favourable impression with a pa.

The use of serious-sounding language is important also in presenting the reason for wanting the appointment. The pa will generally try to divert the sales person's approach to a less senior member of staff. By orientating the reason to fit into the contact's responsibility, there is less chance of the approach being diverted. So it's important to tailor the approach to fit with the level of, and functional responsibility of the person being approached for the appointment.

For example, a managing director's pa will refer anything purely functional to the functional department concerned, ie., HR issues will be referred to personnel; IT issues will be diverted to IT department; sale sales and marketing will be referred to those departments. The only issues which will win appointments with MD's, CEO's, or FD's (the main decision-makers) are those which are perceived to significantly affect or benefit the profit and/or strategy of the business.

Therefore if the sales person seeks an appointment with one of these decisions-makers, the approach must be orientated to have a potentially significant affect or benefit upon profit or strategy.

On occasions, the sales person will not be granted an appointment with the targeted main decision-maker, but instead will be referred by them to make an appointment with a lower ranking manager or director. If this happens it's no problem - the sales person then proceeds with the MD's or FD's endorsement to develop the situation with the lower ranking contact. The fact that it's been referred by the MD or FD gives the sales person vital authority and credibility.

Being referred down is fine; but trying to refer upwards for eventual purchase authorisation or budgetary approval is nearly impossible, which is why appointment-making should always aim high, with a strategically orientated proposition.

Avoid scripts - everyone recognises and reacts against a script. Just be your honest self. You must, however, **smile** and mean it. If you don't feel like smiling, then don't do any sales calling - do some paperwork instead until you cheer up. If you rarely cheer up then you should get out of selling, because unhappy people can't sell. You must also smile on the phone, because words spoken with a smile or a grimace sound different, and people can tell which is which. Just say "Hello, I'm/this is (first and last name), from (your organization), can I take a couple of minutes of your time please?", or "are you okay to talk for a minute?"

Let your personality shine through - don't force it, don't try to be someone that you're not, just be you. If you are door-knocking and personal cold-calling - which is only recommended for smaller prospects - be professional, enthusiastic and straight-forward. Resist any temptation to employ gimmicks, jokes and flashing bow-ties - your credibility will be undermined before you even open your mouth.

Some trainers talk about PMA - Positive Mental Attitude - and suggest that this is some kind of magic that anyone can simply turn on and off at will. For all but the most experienced practitioners of self-hypnosis or neuro-linguistic programming, this is nonsense. If you're not feeling good, don't force it or you'll waste the call and feel worse. Just wait until you're in the right mood and everything will be fine.

Sales people were, and still are, taught to use an alternative close when making appointments, eg., "What's best for you, Tuesday morning or Thursday afternoon?..." This can be quite insulting to another person, who'll have heard the technique about a thousand times just in the past week, so it's best avoided these days. Just ask when would suit best; or initially, "What week are you looking at?..", and then take it from there.

Don't suggest appointments at 9.00am or 4.30pm, or at lunchtime, but if they're offered don't quibble.

Here is a simple stage-by stage 'script' for beginning the initial approach to a new prospective company, through the PA:

telephone sales/telemarketing flexible 'script' for initial sales approach

There is no magic, secret or trickery involved - the process is based on straight-forward logic, and straight open, honest, professional language. It also helps

greatly to have done some research before-hand to know what sort of proposition is likely to be of interest to the company.

First you'll normally speak to the person on switchboard. Introduce yourself - full name and company - and ask to be put through to the PA (personal assistant - or secretary) of the director/VP for the function that you believe makes the strategic decision about your offering (if in doubt ask for the PA to the CEO/MD/President/General manager):

" Hello, this is (your full name) from (your company name) - could you put me through to the PA for the (relevant function, e.g. Sales, Finance, IT, Operations, etc) director/VP, thanks - what is the PA's name please?" (Ask this last thing while you are being put through - it will help you to know the PA's name now and in the future should you call back - this person is there to help his/her boss - don't try to by-pass him/her - ask for their help - that's their job - to be a vital link in the communications between their boss and everyone else).

When put through: "Hello, this is (your name) from (your company name) - is that (name)/are you the PA for the director/VP? (depending on whether you have the PA's name or not.)

If no, ask when/if he/she is available and if applicable if you can be transferred to them. If yes -

Ask the PA: "I wonder if you could help me please?"

PA will normally say: "Sure/I'll try/it depends/what's it about?"

You say, "I'd like to submit a strategic proposition to (company) concerning (briefly describe your area of interest using professional straight language, but do not go into great detail, and try to use a description that is unlikely to attract the response: 'we've already got that covered thanks') - could you tell me to whom I should initially approach that has a strategic view of this?"

Or:

"I'd like to open dialogue with (company) about (again describe your area of interest using professional straight language, but do not go into great detail, and try to use a description that is unlikely to attract the response: 'we've already got that covered thanks') - could you advise how best to do this, to whom I should write or speak, and when's the best time to reach them on the phone afterwards?"

Or:

"I wonder if you can advise me on what's the best way to find out who, when and how for (company) determines strategy and decides solutions and providers in the area of (again, briefly describe your area of interest using professional straight language, but do not go into great detail, and try to use a description that is unlikely to attract the response: 'we've already got that covered thanks')."

And then take it from there - be guided by the PA. Fitting in with their communications and decision-making processes and systems is as important as your proposition and service, and the PA is the best one to help you begin to understand about this.

the appointment - open plan selling - step 3

There are some obvious things to do pre-appointment which can be overlooked, so here they are:

- establish how long the meeting will last and who'll be there
- confirm the appointment in writing - keep it brief, professional, and you can even provide an agenda for the meeting, which shows you've thought about it, and prepares the contact for what's to come
- gather any more information that you need - the willingness of the contact's support staff to help will be quite high at this stage, but don't be a nuisance
- ensure you've prepared everything that you might need for the meeting - broadly, you must be able meet the expectations that your contact has for the meeting, mainly this will be information about the company, its products and services; maybe relevant case history examples (if any exist - summaries of successful supply contracts to similar organizations)
- learn anything you need to know to avoid being late - map and directions; security gate check-in procedure; car-parking; journey and travel time - allow sufficient time for delays

The sales person's aims at the first appointment are to

- complete the gaps in the basic research and planning template, ie the basic company profile (though not necessarily any mundane points, which could be provided later, but certainly the strategic information and views)
- establish personal rapport and trust, and the credibility of the sales person and the selling organization
- learn about the prospect's business, priorities, problems, trends and issues, and especially the corporate aims and objectives of the main decision-maker(s)

- gather relevant information about the strategic needs, implications and potential benefits linked with the product/service
- understand the prospect's buying process, including people and the role of influencers, budgets, timescales, procedures, internal politics and attitudes, competitors and existing supply arrangements
- understand the trading preferences of the prospect - purchase vs lease vs rental - long term partnerships vs short term contracts - payment, ordering, lead-times, inventory, one-stop-shop vs dual or multiple supplier arrangements, etc
- agree a way forward that progresses the opportunity in a way that suits and helps the prospect, in whatever areas of help that are useful to the prospect

The sales person's aim at this stage is absolutely not to launch into a full-blown presentation of the product/service features advantages and benefits. Sales people who do this will be listened to politely, ushered out and forgotten. (They'll then wonder why the once attentive, interested prospect afterwards won't return the sales person's phone calls, let alone agree to another meeting.)

The sales person must be prepared to talk about the relevant technical aspects and benefits if asked, but typically this will not happen in major account situations, because the prospect will know that the sales person is in no position yet to present a relevant solution or proposition of any kind.

The sales person will be expected to know about and refer to some examples of how the product/service has produced significant strategic benefits (profit and/or quality - making money or saving money) in similar organizations and in similar industrial sectors to the prospect's organization. This is more proof of the need for good industry knowledge - beyond product knowledge and FAB's - this is knowledge about how the prospect's organization could significantly benefit from the product/service.

It may be also that the sales person is able to convey and interpret issues of legislation, health and safety, or technology, that have potential implications for the prospect's organization. This is a great way to build both credibility and added value for the sales person and the selling organization.

At the beginning of the appointment explain what you'd like to achieve - broadly a summary of the points above (essentially to understand all the relevant issues from a strategic perspective - and to what end - which is to identify how best to progress the situation in a way that will be most helpful to the prospect.

And then you're into the questioning phase, which has already been outlined in the Seven Steps of the Sale.

Where questioning differs in major accounts selling compared to the style within the Seven Steps, is that the prospect's perspective and situation are wide and complex, so more care and time needs to be taken to discover the facts. If the appointment is with a senior decision-maker the breadth of implications and issues can be immense. Any product or service can have completely surprising implications, when an MD or CEO explains their own position. For example, a purely technical product sale lower down the organization, where specification and price appear to be the issues, might have enormous cultural and cultural implications for a CEO. A new computerised monitoring system for example, would again simply have price and technical issues for a middle-ranking technical buyer, but there could be massive health and safety legislative compliance issues (threats and potential benefits) for the CEO.

Only by asking intelligent, probing questions (mostly open questions, and use of the phrase 'why is that') will the issues and opportunities be uncovered.

Sales people really only need a pad and pen for the great part of the first meeting (ask if it's okay to take notes - it's a professional courtesy). The sales person should actually try to adopt the mind-set and style of an 'expert consultant', specialising in the application of the particular product or service to the prospect type and industry concerned - and not behave like a persuasive sales person. The appointment process and atmosphere should be consultative, helpful and co-operative. Steven Covey's maxim 'Seek first to understand before you try to be understood' was never more true.

Senior experienced decision-makers will provide a lot of relevant information in response to very few questions. Lower ranking influencers need to be asked more specific questions, dealing with an issue at a time, and they will often be unable to give reliable information about real strategic decision-making motives and priorities, because they simply do not operate at that level.

There is twin effect from asking and interpreting strategic questions: first, vital information is established; second, the act of doing this also establishes professional respect, rapport and trust. Combine these two and the sales person then has a platform on which to build the next stage.

agree audit or survey - open plan selling step - 4

For anything bigger than a simple small business prospect, normally the stage after the appointment is to survey, audit or gather necessary data to be able to produce a sales proposal. Therefore at the appointment it is important for the sales person to agree the survey or audit parameters: exactly what is to happen, how it is to be done, whether a cost is attached (rarely, but can be if significant

expertise and input is required), a completion date, who is to be involved, and what the output is at the end of it, which is normally a detailed sales proposal.

The survey will normally take place some time after the appointment; it would be rare in a large account situation for the sales person to be able or to be asked to carry out a survey immediately.

Therefore, after the appointment the sales person needs to summarise very concisely the main points of the meeting and the details of the survey, particularly focusing on its purpose and outputs, from the prospect's viewpoint. This confirmation must include all necessary parameters to ensure no misunderstandings develop and that seller's and buyer's expectations match.

The document outlining the survey parameters and aims should be copied to the relevant people in the seller's and buyer's organizations.

carry out the survey or audit - open plan selling - step 5

This part of the process will depend on the type of product or service, and the process of the selling organization. Some will have dedicated survey staff; in other situations the sales person may carry out the survey.

For a large prospect organization this survey stage can be protracted and complex. It may be necessary for reviews during the survey process to check understanding and interpretation. Permissions and access may need to be agreed with different sites or locations in the prospect's organization, and this should all be managed sensitively by the sales person.

It is essential that the sales person manages this stage properly, thoroughly and sympathetically. This is because the way that a survey is conducted serves as a very useful guide to the prospect as to the potential supplier's quality, integrity and professionalism.

write the product/service proposal - open plan selling - step 6

The sales person is responsible for writing the sale proposal, which should reflect the findings of the survey.

Some sales organizations have dedicated people who write project proposals or quotations. In this case the sales person should ensure that what is written is relevant and concise, factually correct, and outlines the organizational benefits clearly stemming from the product or services being proposed.

It may be possible for the sales person to involve an influencer or decision-maker in the drafting of the proposal, so that it is framed as suitably as possible to

meet the requirements of the prospect organization. Getting some help in this way is ideal.

Proposals that are necessarily lengthy and very detailed should begin with an executive summary showing the main deliverables, costs and organizational benefits.

The sales person should always try to present the sales proposal personally, rather than send it. The prospect may agree to, or actually ask for, a presentation to a group of people in the prospect organization including influencers and decision-makers, which is ideal.

The sales person should try to avoid any situation where a proposal is presented on the sales person's behalf in their absence, by an influencer to the decision-maker(s).

If the open plan process has been applied thus far then it's actually unlikely that the prospect would not want the sales person's involvement at the presentation stage.

present the sales proposal - open plan selling - step 7

The aim of the presentation must be based on whatever is the next best stage for the prospect, not for the seller. Large organizations will not be pushed, and to try to do so often risks upsetting the relationship and losing the opportunity altogether.

It may be that just one presentation is required and that approval can be given there and then, or the sales process may warrant several more refinements to the proposal and more presentations or meetings. It could be that the decision-maker is advising and needing the sales person's help in how to achieve positive approval for the proposal from the influencers. Or the decision-maker may have given agreement to the concept already, subject to cost and being able to implement without disruption. Whatever the aim is, the sales person needs ensure that the presentation is geared to achieving it.

The presentation can take place in widely different circumstances, depending on what suits the prospect.

Groups of influencers and decision-makers need to be handled very carefully, and the sales person must by now understand the roles and motives of all the people present, in order to present and respond appropriately.

The presentation must be professional and concise, whatever the format. Adequate copies, samples, reference material must be available for all present.

The sales person must enlist help with the presentation from colleagues if required and beneficial, which will generally be so for large complex proposals, in which case all involved must be carefully briefed as to what is expected of them, overall aims and fall-backs etc.

The presentation must concentrate on delivering the already agreed strategic organizational needs. People's time is valuable - keep it concise and factual - don't waffle - if you don't know the answer to something don't guess or you'll lose your credibility and the sale for sure. Preparation is crucial.

negotiate/refine/adapt/conclude the agreement - open plan selling - step 8

In open plan selling it is common for agreement in principle to be reached before all of the final details, terms and prices are ironed out, and if the opportunity arises to do this then such as understanding should be noted and then confirmed in writing. Moreover, in very complex situations it is certainly advisable to try to obtain provisional agreement ('conditional agreement' or 'approval for the concept in principal') as soon as the opportunity arises.

In this event the sales person must agree and confirm the various action points necessary for the conclusion of the agreement to the satisfaction of the customer.

A similar process takes place when the prospect seeks to negotiate aspects of the deal before finally committing. Some situations develop into negotiations, others into more of a co-operative mutual working together to agree points of detail. Generally the latter is more productive and by its nature avoids the potential for confrontation. However some prospects will want or need to negotiate, in which case it's essential at this stage to follow the rules of negotiation.

It's critically important at this point to establish conditional commitment for the sale in principle, ie., that subject to agreeing the points to be negotiated, the deal will proceed. Do not begin to negotiate until you have provisional or conditional agreement for the sale.

As with the other stages of open plan selling, it's important to adapt your responses and actions according to what the prospect needs, especially in meeting their specific organizational needs in the areas of operating, communicating, processing and implementing the decision.

Management of the introduction, change, and communication of implications (specifically training) are all likely to be important (and often late-surfacing) aspects of the prospect's requirements when agreeing any major new supply

arrangement. So be on the lookout for these issues and react to meet these needs. The supplier's ability to anticipate and meet these requirements quickly become essential facets of the overall package - often extra potential added value - and actually contain some of the greatest potential perceived benefits of all.

When the negotiation or agreement is concluded it is the sales person's responsibility to confirm all the details in writing to all concerned on both sides. Deals often fall down in the early stage of implementation through the sales person's failure to do this properly. Expectations need to be clearly understood to be the same by both sides at all times.

The modern sales person needs to be an excellent internal communicator these days (ie., to the selling organization's people, as well as the prospect's). All big deals will invariably be tailored to suit the customer's needs, and this will entail the sales person being able to agree and confirm requirements and deliverables with the relevant departments of the selling organization.

This implies in turn that the sales person has a good understanding of the selling organization's strategy, capabilities, costs, prices and margins, so as to know what is realistically achievable, strategically desirable, and commercially viable. The customer may always be right, but this does not automatically imply that the supplier should do everything without question just because the prospect needs it - often there are limits, and these need to be managed and explained.

oversee the sale's implementation/fulfilment/completion - open plan selling - step 9

Even if the concluded sale is to be passed on to another department in the selling organization for implementation, the sales person must always remain the guardian of that customer and sale. The sales person will have won the sale partly by virtue of their own credibility and personal assurances, so it's unforgivable for a sales person to 'cut and run'.

The sales person must stay in touch with the decision-maker and give regular updates on the progress of the sale's implementation. There may be ongoing issues to manage - in fact there will be.

If the implementation is very complex the sales person must ensure a project plan is created and then followed, with suitable reviews, adjustments and reporting.

Upon implementation the sales person must check and confirm that the prospect is satisfied at all levels and at all points of involvement, especially the main decision-maker and key influencers.

feedback/review/maintain ongoing relationship - open plan selling - step 10

In many types of business, and especially major accounts selling, the sale is never actually finally concluded - that is to say, the relationship and support continues, and largely customers appreciate and need this enormously. Good sales people build entire careers on this principle.

Arranging regular reviews are vital for all service-type arrangements. Customers become disillusioned very quickly when sales people and selling organizations ceased to be interested, communicative and proactive after the sale is concluded or the contract has been set up.

Even for one-off outright sale transactions, with no ongoing service element, it's essential for the sales person to stay in touch with the customer, or future opportunities will be hard to identify, and the customer will likely go elsewhere.

These days, most business is on-going, so it needs looking after and protecting. Problems need to be anticipated and prevented. Opportunities to amend, refine, develop and improve the supply arrangement need to be reviewed and acted upon. This must always ultimately be the sales person's responsibility - and it should have been part of the original product offer after all. Even if a whole team of customer service people are responsible for after sales implementation and customer care, the sales person must keep a strategic 'weather eye' on the situation - not to manage day to day issues, but to ensure that the supply arrangement and relationship remain high quality, better than the potential competition and relevant to the customer's needs.

Summary of the open plan selling/strategic selling process

Open plan selling requires a lot of thought and expertise. The rewards are well worth the effort though - the sales person is seen more as an advisor, and the selling process becomes more of a co-operation and partnership, which is altogether much more of a professional and civilised way of doing business.

1. **research and plan - market sector, prospect, and decide initial approach**
2. **make the appointment**
3. **attend appointment to build rapport and credibility, gather information about business needs, aims and process, and develop/agree a project/product/service specification**
4. **agree survey/audit proposal (normally applicable)**
5. **carry out survey/audit (normally applicable)**
6. **write product/service proposal**
7. **present proposal**
8. **negotiate/refine/adapt/conclude agreement**
9. **oversee fulfilment/completion**
10. **feedback/review/maintain ongoing relationship**