

To Sell Is Not To Sell

For Professionals



Overview of Process

As a professional, the word *sales* is often converted into *marketing*. Why? I believe it is because sales has gotten such a bad name over the years, professionals like yourself prefer the word marketing.

Actually, I don't blame you. Bad salespeople exist in every profession, even yours. The ones that do things completely wrong are the ones we see. The thought of looking at all like this type of person is almost offensive. I get it. That's why I created a new way to build business. With integrity, professionalism and pride. I hope you enjoy this ebook!

In this overview, I will cover the Schulz Business SELLutions Process entitled "**To Sell Is NOT to Sell**," providing the specialized knowledge and experience for a working business conversation. No one likes a hard sell.

Schulz Business has analyzed how conversations work to allow both you and your client enjoy the best business relationship and results. This approach reviews common challenges and provides knowledge and experience to meet them, utilizing a systematic process to the business conversation. The Process includes topics like how to build your referral business, turn introductions into appointments, consistently get to the "real issue," and have a clear next step with your prospects EVERY TIME!

It is important to learn how to manage your client conversations to benefit you both and have your one time clients become repeat clients.

Below are discussions of Prospecting and Building Client Relationships through Personality Styles and Bonding, as well as other parts of the important first discussion with a potential client.

1. PROSPECTING



The act of looking for business in a variety of ways, of setting goals on business development tasks and making them a consistent habit.

Professionals with business development responsibility often prospect only when they have little or nothing in their 'sales' funnel.

You realize you do not have a lot of opportunities coming up for the near future, so you rush out and start calling on new opportunities trying to pick up some business. The problem with that is there is a bit of desperation when you prospect at these times and that desperation will

come through. To avoid that, prospecting needs to be set as a goal and done continually just like an exercise program. It is true that once you bring in a new client, you may have to adjust the amount of prospecting time for a while since you may have additional tasks once you bring on a new client. There is nothing wrong with that, but you can never stop entirely.

For example, if you need to close \$1M in one year, and you are up to \$800,000 by September, you may feel pretty good about making the rest of the year. You now have \$800,000 worth of clients that you have to maintain, so you feel you are too busy to prospect.

Well, that is not acceptable.

What we all need to do at that point is figure out what the new, adjusted prospecting goal is as we build our businesses. It never goes away; it just changes.

Here are some tips to keep prospecting a regular part of your business;

1. CREATE A VARIETY OF “MARKETING” METHODS. You need to have a marketing or prospecting mix when it comes to prospecting. We inherently know that it is important to set goals. For example we say we are going to set cold calling goals for 25 calls per day. This alone is not enough to have any results. Prospecting is a **mix of activities** that we do, that helps build our business. Today, especially it is important to have a

variety of prospecting when it comes to activity goals. Here are some examples of what may need to go into the mix;

A. Networking

Networking is a very powerful prospecting tool if done properly, which means done with goals and a plan.

As a professional you can and should use relationships with other business professionals to get referrals. You need to understand how to bring that to the next level through networking with others as well as colleagues.

The process of networking is very specific. It is a waste of time and usually very uncomfortable for some of you to walk around a networking event handing out and collecting business cards. Typically you sign up for a local function because you know it is important. The evening (or any other time of the day) you go, your car *really* wants to take you home but, no, you are committed! You drive straight there and walk up to the event entrance.

You get your name tag, you walk into the room full of faces and you desperately look for someone that you know, *not necessarily someone you like*, just someone that you know.

If you don't see someone that you know you will probably do one of the 3 "B"s; go to the *Bar, Buffet or Bathroom*. Does this sound familiar? Let's stop this. Remember- Networking is ***not*** for prospecting. That 's right!

Networking is truly for finding other people that you consider "Strategic

B. Strategic Alliances

A Strategic Alliance is a relationship built with someone in the community to purposefully help each other with introductions to specific referrals *both to you and from you.*

There are 3 types of Strategic Alliances:

The **first** is *someone with a complimentary product or service.* As a Professional who has business development responsibility you are probably doing some of this now. For example, if you get a client whose needs something that you don't provide, but is often purchased along with yours. you will often refer to another type of professional who specializes in that particular issue.

The **second** type of Strategic Alliance is *someone who speaks to or regularly has an audience with your prospects* They have opportunities to work closely with potential clients of yours but do not do what you do. This includes someone who doesn't compete with you but still has the same Potential prospects. This category is to identify someone who is not in competition with you and may not even be a complimentary product but still shares the same potential prospects.

This is often someone who you may not likely see as an alliance but Can be because of the prospects you both are interested in.

The **third** type is what we often call a *"mover and shaker"*.

Though I dislike this term, it is easy to understand. This is the person(s) in your *community who everyone knows, likes and respects. For example if you got a call from this person and they asked you to speak to another person, you would take the call. Most importantly, this is *who you want to be seen as* in your own community.

How? Be a connector. Help others with introductions to people that *they* want to meet. Your job is to be seen as a connector, not a sales person.

That will come.

** When I use the term community I am referring to either geographic and/or industry.*

Lets go back to Networking

Now that you understand what a strategic alliance is and that your responsibility at a networking event is to connect others as well and find strategic alliances for yourself, let's re address the event.

First, set a goal before you go. The goal could be, that you want to find two strategic alliances that I think I would be able to help give referrals to and them to me. Or review the list of attendees ahead of time, meet as many people that you can and ask each of them a few questions. Here are some suggestions of questions you might ask; What is it that you do? How long have you been doing that? Sounds interesting, how did you get into it? If I

were to meet someone who would be a good referral for you, what would that look like? You are trying to engage and get a feel for who they are and see if they “get it”. What does that mean? It means they have an interest in you and what you are talking about as well. They are actually listening and engaging in conversations as opposed to *pitching* to you. If you feel they get it, suggest a meeting outside of the event within the next week or so to learn more about each other’s businesses and see if we can help each other with referrals.

D. Past Clients

Go back to past clients and “project ending” clients and see if there may be an opportunity now. That's a rich area for us because we often walk away from opportunities we have in our lap (or had) because we are perusing new ones. We do not really know why they may have left and don’t put them in our priority any longer. Why? I don’t know. Maybe it’s our ego. Let’s not let that get in our way.

E. Existing Clients

Going to existing clients to see how you can help them on something other than offering your product or service. This is our job. You want to bring added value to your clients. What else can we do to help them? See if there are other things that they may need. You may know people in the community that they would like to meet. If they are not a business person,

there still may be something because you have "connections in the community" that you may be able to recommend. You always want to bring value to your clients over and above just what you do for them. Once you help them, then you certainly should tell them how you do your business on referrals and describe to him some examples of what a good referral is to you. The more specific you are, the better chance you will get one. Give them ideas on how those referrals may come to mind with specific triggering language they may hear in conversation with someone.

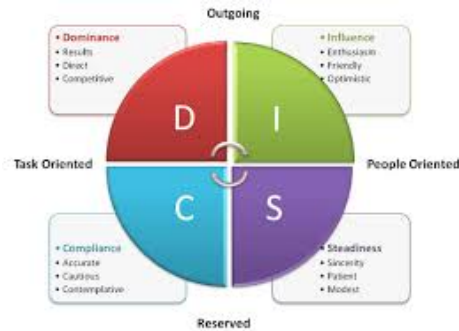
F. Goal Setting and Tracking

Goals should not be solely revenue based. Goals are also connected to the activities that you set and achieve daily, weekly and monthly. The only way to be successful is to learn what works for you as an individual and to track those activities with results.

We will often use the "excuse" of being so busy with projects that we do not have time to prospect. I have called it an excuse because it is. Since we tend to do the part of our job that we enjoy the most first and then do things in our job that have deadlines, it is not surprising we do not have *time* to do the basic things consistently to build our business. Without having a true plan for prospecting and following it to the letter, you will not reach your true potential. Make no mistake. If you do not commit to what you need to do every day, every week, every month, you will get more of the same as you always have.

2. BUILDING CLIENT RELATIONSHIPS:

Personality Styles and Bonding



It is important to identify the characteristics of each personality style to know how to best communicate with each different type of person, while still being aware of our own tendencies and personality traits. We need to understand how to become comfortable with the concept that everyone does not like things presented the way we do. It is important to develop an understanding of how to create a "bond" with our client, ultimately instilling a sense of trust.

What you need to spend time on is to understand the importance of how people make decisions and to realize that there are different ways to do that and it may not be the same way that you do.

There are four distinct personality styles that create particular tendencies in each person. One thing that is important to remember--we are all

combinations of different personality styles. We do have one style that tends to be more prominent, and we all have other strong characteristics that come out but are not the strongest style. Recognizing your style can give you an incredible advantage in communicating.

*** Dominant/Decisive**

This personality style needs to be in control. They will often begin any meeting or conversation with their thoughts or opinions first. They are leaders in an organization because they like to be in charge. They are also change agents and if they see value will make a change even if it is not the popular decision. They are early adapters as well. These are the people that will have the newest, latest and greatest. They will typically drive power cars and look distinguished. They are great referral sources and have a pretty healthy ego as well. You need to be strong but not overpower this person. If they see value, they will engage you.

*** Influencer/Interactive**

This personality style wants to be liked and relatable. They use their personality and the building of a relationship to bond with others. These are the chatty "salesy" types that often are seen as shallow or non-trustworthy. This isn't always true but the overly enthusiastic personality can be misunderstood. These people tend to overpromise and under deliver, though they mean well even when they promise something, at that

time they believe they can make it happen. They are the rule benders. Being social is the way they do business so if they like you as a buyer, they will buy from you and if they do not, no matter how much better you may be then the competitor, they won't.

*** Steady/Stability**

This style is one that does not like change or conflict. It is important to them to feel little or no pressure; if they do feel pressure, they tend to shut down and tell you what you want to hear. This style will also be very accommodating and make you feel comfortable. What they will tend not to do is make a decision, especially one that involves change. Make sure that if you find this personality ask if there is anyone else that will have input or questions on the subject (not "who is the decision maker"-bad question). They typically want to involve someone because it absolves them of the pressure of making a decision alone.

*** Analytical/Cautious Thinker**

This person is seen as a perfectionist. They are typically very smart, very educated and are proud of that. They are skeptical especially at the beginning and will have lots of questions for you, some they may even know the answer to already. These people are decision makers. I do not necessarily mean that they have a particular position in an organization,

but they will make decisions but only after all of their T's are crossed and their I's are dotted.

If you would like to see a more in depth review of these personality styles watch

this video below:

<http://b2bsellutions.com/gretanomics-disc-full/>

(copy and paste the link if it isn't working from here)

3. CLIENT ENGAGEMENT



Keeping those personality styles in mind, the **Schulz Business**

SELLutions Process coaches you through the steps necessary to establish a satisfactory and successful client relationship. When you are first engaged with a potential client, there are necessary steps to keep you in control and to create a trusting business atmosphere:

A. PRE-QUALIFICATION/ENGAGEMENT

A short conversation that you have with the client to **not** only qualify them for you, but to help them qualify *you* as their *business partner* of choice.

Ground Rules for the initial conversation--on the phone or in person

Ground rules are going to help you in several ways. It is important to have a pre-qualification conversation for the reasons discussed earlier.

Ground rules help to set certain expectations and identify specific needs to better prepare for upcoming conversations, meetings and presentations. It is important to clearly lay out a plan on how to differentiate yourself from the competition, eliminate sales resistance, and set the stage for a more consultative relationship. A clear understanding and explanation of what will happen, how it will happen and what did happen makes all comfortable in a conversation and relationship.

The idea in being clear is to make all parties comfortable and will quickly engage trust.

Example. Let's say you have done a good job of asking for referrals and now you have a call from a potential new client. Ground rules sound something like this; "Thanks so much for calling. I appreciate that John Smith told you to call since I have helped him, *but I don't want to assume that his*

issues are the same as yours, so I recommend that we take a few moments so I can ask you a few questions, you may have some for me, at that point we should be able to figure out if in fact what your issue is, if it is something I can help you with, if not, I will certainly let you know and if I can, we can figure out what our next step should be. Does that work?

* * Please remember these are my words and my style. You do not have to use these words. They must be yours so please practice the idea of the ground rules and make them your own.

Pre-qualification/Engagement Questions and Recap

Here, you will discover how to establish a true "partnership" relationship with your prospects before your appointment. This pre-qualification/engagement can happen on the phone, which is most common, or in person immediately before the in-person appointment happens. You need to evaluate whether an organization/person is a "true prospect" or a 'suspect' early on. The questions you will ask need to be specific but open ended and must begin with questions on subjects that the prospect will find important to talk about. The "who, what, when, where, and why's" are important but only *after* you engage him/her in conversation about what is important to them *first*; challenges, fears, concerns etc.

Examples of questions.... (Just examples) The idea is to get them talking...

What prompted the call?

Tell me about your situation?

How long has this been an issue?

Have you done anything yet about the situation? If so What? Share with me how it is affecting you/your business?

4. THE APPOINTMENT (can also be done on the Phone)



The Interview

It is important to set expectations for each meeting to keep you in control of the conversation, including length, agenda, and the potential outcome or expectations of the meeting itself. In the interview sections, it is important

to then ask the right questions, that are more in depth than the pre-qualification questions. Not just questions that “lead to a yes”. Improve your listening skills to discover what your prospect is *truly* looking for not just the “features and benefits” of your services.

It is important to ask in-depth questions to uncover the *real needs* not just what they say is important. People most often don't reveal the real reason they are looking at one product or service or another. It isn't that they don't want to tell you, people just speak in basics and getting to the true "hot buttons" or reason why it matters will ultimately help close the sale.

This will also allow you to customize your presentation to what is truly of interest to them, not just what you think or *your firm* says is important! As experts in our own products or services, we can often get caught up in looking "smart" and trying to prove you have experience by showing how smart we are. This is a mistake I see so often in professionals. People make decisions on how much you know by the skill of the question that you ask, NOT by what you tell them. We assume that if we tell them what we know, how we know it, and how experienced we are that they will hire us. Often it backfires because the client believes, somewhat rightly, that you are not listening to them.

Investment, If/Then, Decision Process

Having a clear understanding of investment is very important. Unless you work on a contingent relationship, there are several ways to charge a client. We must be clear about how these things work and more importantly this conversation about money cannot happen too soon or too late! It should happen here only *after* you have discussed the issues they are experiencing and you have fully helped the client self-realize that you are the one who truly understands their concerns. We often think of the *close* in sales that no one likes: "Sign right here" or "What will it take to get your business?" This is absolutely not what we are talking about. As a matter of fact it is practically opposite of that. The close or the ending of the sales process conversation is a natural step in the process. If all was done properly early on, then all of this is part of the professional path to the signatures and to begin to work for your client.

5. MEETING RECAP EMAIL



Summarizing the interview in writing to ensure that you and your prospect are both on the same page make sure that you understand what really matters to them is not only helpful in your closing presentation, it is the right and proper communication for all.

This step is relevant especially if you need to set up a next step your client. What is often not included is the very important summation of the client conversation about their unique situation. A lengthy form letter sets up a distance between you and your client and diminishes trust; a tailored letter restating the clients' concerns and your discussion can include the other language and encourages a feeling you are on the same side.

To begin the meeting recap email it is important to let the prospect know that this is a recap of your conversation. Then each issue that came out

needs to be recapped separately. For example; "You stated that you have had an issue with__. Because of this issue, you are concerned about__."

What you are doing here is reviewing what the issues they have revealed are and what those issues could be causing them or their organization.

Next, it is important to recap the investment that was discussed to make sure everyone is on the same page. This is important to confirm how pricing works including things like the price itself, payments, billing dates etc. You will need to confirm that the Clear Next Steps that were agreed upon are reiterated so all are perfectly clear. Leaving this step out causes a lack of decision making on the part of the client. This often forces us to "check-in" with them instead of having agreed to a next step together and on the calendar.

6. RECOMMENDATION



What I mean by recommendation is that you are painting a picture of what moving forward looks like by creating possibilities or initial steps. It is so important to properly summarize the information gathered, review, and "match" your prospect's specific concerns (hot buttons) with your customized solutions.

We often feel it is important to give a dissertation on our organization, our background and all of our credentials. Frankly they aren't as important as you think. *If you have done everything right up to this point they are ready to go with you and do not need additional convincing. It is OK to include some of this information here but *you must* start with a recap of your previous conversation, confirm nothing has changed and then recommend your services based on what they said was important *to them*. In other words less is more here. Your client cares about what is in it for them, not what you believe is important. This is very important.

*If you do need to put certain language into your presentation, put it at the end and review what they are interested in first!

If you did a good enough job up until this point and they agreed what the next steps were going to be before you began your recommendation, you should have a new client and a profitable, successful relationship in the making!

Don't forget to sign up for Greta's weekly short video weekly tips! Go to

www.GretaNomics.com

If you like the ideas and process in this ebook, I recommend that you go to www.SalesSuccessKit.com to review the program or go to our web site at www.schulzbusiness.com and look at the *SalesSuccessKit*. We welcome the opportunity to expand your business and make your client relationships successful!