

# Sales Process for Corporate Engagements



# **SALES PROCESS FOR CORPORATE ENGAGEMENTS**

Comprehensive Practitioner's Guide

BRIAN MORGAN

The University of North Alabama Digital Press  
at Collier Library  
Florence, AL



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# ABOUT THE AUTHOR

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# OVERVIEW

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The Sales Process for Corporate Engagement focuses on a fundamental sales process. This book aims to be the most comprehensive, concise sales textbook ever written. Time will be spent on proven concepts and methods that work across all industry segments. This book serves as a practitioner's guide.

This textbook will teach the sales processes and fundamentals that drive sales success in a corporate environment. The text is built to be a concise study of sales methods to be used in a manner that teaches students and non-sales employees the art and science of sales.

We will answer some of the most common questions related to sales, "What are the best processes? How do I negotiate? How do I close? What is an implementation plan?" This text will walk through the sales process from beginning to end. It will dissect each segment in a simplistic way.

The teaching methods used will be appreciated by all learning styles. The self-discovery platform will ensure concepts are lived. Therefore, taking education to application more successfully than lecture-type teaching. The personal role-plays and video learning sessions will encourage student involvement and yield an educational environment that is focused on continuous improvement of skill and less on

assessment. Grades are important. However, improving one's level of skill in their desired trade is the goal.

Instructional guidance in the form of video [YouTube channel] is provided throughout the text. In addition, you will find instruction, role plays, and assessments to facilitate the learning. The text is segmented into the follow:

- Negotiations
- Marketing Insights
- Sales Visit Stages
- The Sales Process, Metrics and CRM
- Implementations
- Planning
- Communication Methodology
- Divine Adaptation
- Closing

The science of sales requires prospect qualification, methodical process approaches to the sales visit, marketing insights, negotiations, proper articulation of value, well-constructed implementation plans, communication skill and the ability to adapt to all people. The engagement journey will take us through all these critical steps of the process and ensure fundamentals are followed.

# SALES PROCESS FOR CORPORATE ENGAGEMENTS [COMPREHENSIVE PRACTITIONER'S GUIDE]

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# Comprehensive Practitioner's Guide

Brian Morgan

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1.

# CHAPTER 1: NEGOTIATION BASICS

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We will begin the study of negotiations with role play. This experiential learning exercise will build a positive mindset for the learning of important concepts related to negotiations.

## **Role Play**

Students will be split into groups of two (buyer and seller). You will receive a role play document password from your facilitator. Each person should read their document for understanding. Prepare for the negotiation. Then video the negotiation with your partner and upload it to your facilitator. You will receive personal feedback based on the interaction of the negotiation recording. Work hard to make a deal.

## **RULES:**

1. Do NOT share your documents with the other negotiator.
  2. Do NOT discuss your role play after you make a deal.
- Prepare – 20 minutes.
  - Role Play for 15 minutes (video the process – check your

audio and video settings prior to the role play.).

- Upload Video per facilitator instructions.
- See debrief of exercise – YouTube channel

NOTE: Role Plays are located in the appendix – careful not to view the opposing side of the negotiation until after the debrief.

### **Negotiation Introduction**

Negotiations is an event that occurs in all phases of the sales process. Negotiations may be something as simple as making a trade to get time with a new decision maker or as complex as a multi-year agreement with a fortune 100 company. For this text, we will keep the study of negotiations elementary; primarily considering a negotiation as a single event during a sales/buying process. Although the study will be basic, one may find this segment fascinating as it will help you in your personal life as well as your professional life. Skilled negotiators are great communicators. They get to the heart of the matter with the other party involved. Two critical skills of the negotiator are 1) Listening...which means that you are not waiting to talk (think about that for a minute) and 2) Questioning...to get the knowledge you need that will lead to a better negotiation outcome.

All sales and buyer engagements follow a process. Some negotiations are focused on one product or service with no personal or professional relationship involved. Other, more common negotiations are of a concerted effort and strive for



a longer-term relationship focusing on multiple products or services over a longer period.

Our focus will be on a concerted sales process model that cultivates profitability for firms over a longer period. Although there are variations of sales processes depending on the industry, we will use a common engagement model adopted by firms that produce long-term partnerships with clients at a corporate level.

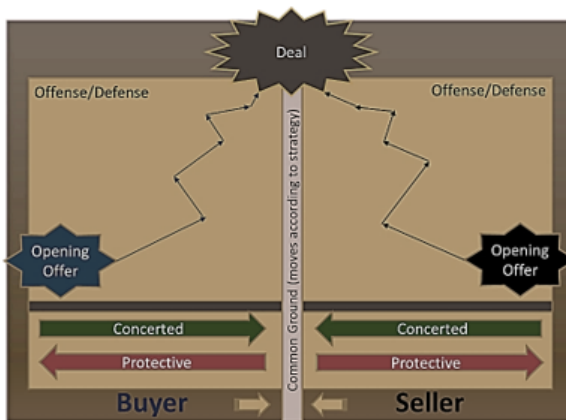


FIGURE 1 NEGOTIATION FIELD

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Figure 1 Negotiation field

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Long-term partnerships require negotiations with *Concerted* efforts to be effective. *Protective* elements must also be present to secure profitability. Well-planned strategies will guide us to work with the other party to develop a plan that works for both entities. In figure 1, we can envision a field where both

parties are trying to reach a deal. Both must be protective of their position. However, they also must have some concerted effort to drive the deal up the field using questions to gain knowledge, proposing scenarios, preparing for trades; all the while following a concession strategy that was planned prior to the negotiation engagement. Its offense and defense working toward a deal that works.

Both Buyers and Sellers must exhibit an ability to work with a concerted effort and balance with the protection of profitability. It is better to walk away from a deal than to enter into an agreement that will erode planned profitability.

### **Negotiation Rules of Engagement**

There are some primary rules of engagement when negotiating. They are as follows:

- Build Rapport.
- Seek to Understand.
- Expect Ranges of Value.
- Position Value Strategically.
- Target Your Outcome.
- Concessions are Key to Winning.
- Closing is Final.
- Emotions are Expensive.
- Use of Tactics.
- Anticipate Actions.

Using common rules of engagement, a negotiator positions

themselves for winning a profitable deal. Let's discuss these more in-depth.

1. Rapport to bridge the discussion – Rapport is a social element that is important to any personal or professional interaction in most cultures. Understanding the culture of the individual or entity may be critical to a successful outcome.
2. Seek to understand – Asking questions to understand the other party's motivation to make deals advantageous to your position. Knowledge is powerful.
3. Expect ranges of value so that you are not surprised – One of the dangers in negotiations is to assume a value that the other party may put on their position. Always expect the other party to suggest a value that is out of your range of rationale. The reason the value may be out of your range of rationale is because you have limited information of the mindset of the other party. Or the other party is simply using a starting value as a *tactic* to set you back in the negotiations. In either case, a skilled negotiator will expect unfamiliar circumstances.
4. Position your value strategically – Setting targets of value in a range from high to low are one of the most important parts of the negotiation. This process should be planned prior to the engagement with the other party.




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Figure 2 Targets

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5. Target your desired outcome – A negotiator must be confident in the target value ranges that they aim to achieve (see figure 2 Target Positions). Setting targets is imperative to a sound strategy. The negotiator should be prepared with a desired outcome. Then, positioning starting points of value is critical to ensuring that you get the target value through the negotiation. It is very difficult to change a position in your favor once you have given up a lower value to sell or agreed to purchase at a higher value.
6. Concessions are key – Concessions must be planned in advance of the negotiation. In addition, never give up value unless you get something of value in return. A skilled negotiator uses the knowledge available to them and proposes creative scenarios that help you achieve

your objective of the target. There are sometimes many negotiables that can be used in the negotiation. Skilled negotiating includes finding these negotiables and including them in the deal. Proper concession planning will help you achieve your target.

A skilled negotiator concedes with a rational process. If you are the seller, a rational process would include a methodical approach of offering your product initially at your high range, then, conceding by making trades to stay at or above your primary target, eventually lowering the price of your primary negotiable to achieve the deal within the planned target range. If a seller offers a low price to the buyer, then tries to increase the price during the negotiation, the *rational negotiation behavior* may be questioned. Therefore, complicating the process of getting to a deal.

#### *Proper Concession Strategies:*

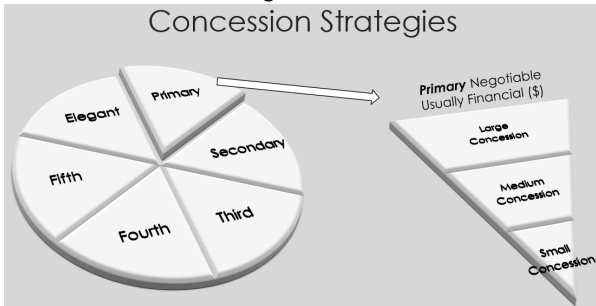
Concession strategies should always have more than one negotiable. However, often, buyers and sellers do not consider more negotiables than their primary negotiable that is most of the time, money.

#### **How to make a proper TRADE**

As the negotiator considers multiple negotiables, the effort to make an effective trade has a process. The following is an example:

1. Seller | “I appreciate you walking me through the process and sharing the challenges and cost implications of the overtime that the paint drying situation is causing. I have experience in this field. If I could show you a product that could cut the dry time in your production by 83%, would you be open to discussing a business relationship?”
2. Buyer | “I’m not sure, we have been doing this a long time and even though it causes us some pain, it still works ok.”
3. Seller | “I understand. I have seen others stay with the process for a little while. Then, they experience our product and the impact. It’s a change for the good.”
4. Buyer | “What do you have in mind?”
5. Seller | “If I could offer my paint drying equipment at an introductory rate of 10% off for a six-month test and assign an engineer to perform a full impact study. Would you be willing to allow us to do a full presentation for your CEO and CFO if the test is successful?”
6. Buyer | “I would be willing to try that.”
7. Seller | “Ok, I will draw up a six-month agreement at 10% and engineer study for the six-month revenue commitment and a presentation with your senior leadership by November 20th. Will you sign by the end of the week?”
8. Buyer | “Yes. I can commit to that agreement.”

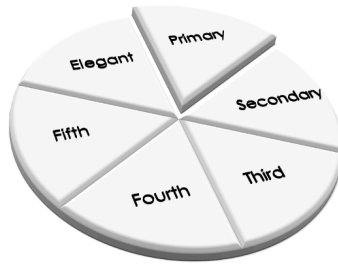
Trades start with a proposal that may be receptive to both sides. The other side will counter with a negotiable, deny it, or be agreeable to it. Once both sides agree there is common ground, the initiator will make a formal request for the trade. Trades are used interchangeably with the negotiables. Be sure to entertain all of the negotiables that are available.



Picture negotiables as a pie. Only serve the pieces of pie when and how you want. An example of the negotiables used during the negotiation in a property development for the where buyer is seeking some owner financing follows:

	<b><u>Buyer</u></b>	<b><u>Seller</u></b>
<b>Primary</b> =	Money (Cost)	Product of interest
(Land)		
<b>Secondary</b> =	Terms of Payment	Interest for debt
<b>Third</b> =	Lease vs. Buy	Lease vs. Buy
<b>Fourth</b> =	Mineral Rights	Mineral Rights
<b>Fifth</b> =	Charity gift	Monument with Park
(grandfather)		
<b>Elegant</b> =	Name of Building	Expertise of
architecture		

As the Buyer and Seller expands with creative negotiables, there will be higher percentages of deals to be made. Planning and anticipating provides more pieces of the negotiation pie to be revealed to make the deal.



*Elegant negotiables* have little cost to the person proposing them. But sometimes can have great value in the mind of the other party.

***When negotiating, never give up something unless you get something of value in return.***

When making a concession, offer the larger value of the negotiable first. Then, work through the negotiation using smaller numbers to show the other party that the attempt at making a deal is coming to an end. When the negotiator gets to the “delta of the pie”, this demonstrates near a walk-a-way and each side needs to be more creative by including more negotiables into the mix of the negotiation.

7. Closing is final – Once the deal is done, there will be an



informal self-assessment by the parties involved. To ensure that the other party gets a perception of a good deal, how you close can be as important to the negotiating as the value you achieved for your product or service. Humility and respect are a negotiator's best friend. A skilled negotiator never shows excitement when they are about to close a profitable deal. It is in poor taste to disrespect the other negotiator with a quick acceptance of an offer, if you are getting the better part of the deal. A reluctant acknowledgement of the value and slower process to commit to close will give the other party a good impression of you and leaves a willingness to work with you again in the future.

8. Emotions are expensive – People are passionate about their money. But they are more passionate when they have a sentimental affiliation to the object of negotiation. A skilled negotiator uses information, achieved through quality questioning, to uncover emotional elements of the other party's position. Sentimental value can be used as a positive influence during negotiations. For example, if honor can be given to the object of negotiation, the other party may put a great value on the honorable efforts and agree to a lower price. If the negotiators never understand any emotional affiliations, roadblocks may go up that become very difficult to pass. Respect the other party's emotional concerns. Learn as much as you can and use it in

negotiation to create new scenarios or to make trades of value for honor and respect, if possible. Community or charity are two negotiables that are sometimes a great part of the negotiation process. However, it takes the right object of negotiation and situation to include these elements.

9. Use of tactics – tactical use of influences or positioning is an important part of creating power in the negotiation. By using positioning statements, third-party references, and peer-reviewed data are ways that a person can create power in the negotiation. Strategically use of this power will determine the effectiveness of effort.
10. Anticipate – being prepared for whatever is released from the other party is important to maintaining a winning mindset in the negotiation. Stretching our range of rationale or thought process of expectations will give us a sense of security when a seemingly unreasonable request comes from the opposing party. For example, be prepared for the other party to ask for 20% when you think it is reasonable for 5%. By anticipating, the emotions stay in check, and you follow your concession strategy without giving away your position in the negotiation.

### Types of Negotiations

What makes a negotiation more protective or more

concerted? Should a negotiator be more territorial and competitive in certain situations? Are negotiations different if this is a one-time deal or when it involves a corporate engagement? These are important questions to ask. Primarily considerations fall in the extreme opposites of negotiation levels that expand between a highly protective position (SIMPLE) and a cooperative/concerted approach commonly found in corporate engagements (COMPLEX). The event type of negotiation can best be determined by the relationship between parties (or desired relationship between parties). For example, a negotiation for a used motorcycle at a business which you will never see again is certainly different than a negotiation with a strategic partner relationship between larger corporate entities. The negotiables are different, and the desired relationships are different.

Simple negotiations do not equal easy. And complex negotiations do not equal hard. They are *elementarily different*. Even with the differences in the relationship expectations in the future, the rules of engagement for the negotiation itself still should have some of the same attributes (rapport, seek, expect, position, target, concessions, closing, emotions, tactics, and anticipate).

Other factors that may affect the negotiation are as follows:

- Skills of negotiator.
- Knowledge of product, service, and other negotiating party.

- Pressures of influential forces.
- Number of negotiables used in the negotiation as value.

## **Needs and Desires**

Negotiables can be anything that you are able to attach value. As discussed with things of honor, sometimes these can have the highest value to a person. When trying to achieve the deal, remember that people have personal needs and desires and professional needs and desires.

Making a deal that secures the need for the other party can be a proper way to proceed if you do not have exactly what the other party is looking to acquire. For example, I desire a new Corvette. I only need a good dependable car to transport me from home to work. I am willing to pay more for the Corvette because I have a stronger desire for the Corvette. It appeals to me more than the minivan that is next to me at traffic light. This concept is no different in a corporate engagement. A firm may need a customer relationship management (CRM) system. Their sales team could probably get by on a rudimentary platform for documenting sales visits. However, the CEO may desire a tool that can assist with strategic planning and forecasting next quarter's profit numbers. To achieve this, she may desire a Corvette of CRM platforms, or at least the add-ons for additional functionality.

Skilled negotiators take advantage of the understanding of fulfilling the needs and desires to make a more profitable deal. If you are selling, desires get more profit. If you are paying,

desires will cost you more. Using your skills to change values in the mind of the other party is an art that is crucial to a profitable deal.

### **Trained and the Untrained**

Individuals that are skilled in martial arts know that there is a difference in a person trained in the art of warfare and the individual that is not. You can see it when they fight. When two people are playing music, the level of skill can certainly be heard. As with Music and War, so shall it be when a skilled negotiator is involved with someone that has no negotiation skill. Negotiations and sales are an art and a science. Just as with music or warfare, there are processes and fundamentals that are critical for success.

Untrained (unskilled) negotiators consider two primary negotiables, the object they want and the money they are willing to give for it (or get, depending on if you are the buyer or seller). Skilled negotiators understand that sometimes there are many negotiables to explore. Your job as a skilled negotiator is to understand the needs of the other party and work toward a deal that satisfies the need for them and achieves the planned deal for you or your party.

### **Knowledge**

Knowledge of the product or service is critical to the articulation of value during the negotiation process. Value comes from the knowledge of how the product or service will be of benefit to the other person and proposing a value that leads to profitable deals. Knowledge is a key component of all

negotiations. A primary goal is to fully understand the who, what, when, where, and how regarding the situation.

### **Forces**

Pressures of influential forces are real. Left unchecked, they can have a serious effect on the negotiator, and ultimately, the outcome of the negotiation. Pressures related to the simpler negotiations could be related to the financial situation. For example, the used car salesman needs one more car to sell by Friday to get the big bonus. So, he may not hold firm on price compared to the guy that has already made the bonus for this month. Another example may be the sales metrics mandated by the sales manager in a fortune 100 firm. If she doesn't make two more sales this month, she may get a warning of employment loss. Management of pressures must be a priority in negotiations.

### **Review**

1. Defenseless strategies yield ultimate defeat.
2. Protective-only positions yields lower perceived value, poor or no deals.
3. Determining the goal for the negotiation (prior to negotiating) is critical.
4. Value can be influenced by a skilled negotiator.
5. Anticipate the ability of the other person to negotiate
6. Prepare for response
7. Use tactics to take the offense to your desired position
8. Defend your position

9. Concessions must be planned and used appropriately
10. Understand the other party
11. Determine how to satisfy their position while protecting yours
12. Help the other person achieve their overall goals without giving away your position
13. Long-term relationships require satisfaction of needs and desires.
  - o The value of desires is always higher in price – get more.
  - o Needs can satisfy the position of the other party.

**Chapter Overview** – YouTube channel

## 2.

## CHAPTER 2: THE CLIENT SALES ENGAGEMENT (SALES VISIT)

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There may be few or many sales visits within the Sales Process for Corporate Engagement. Visits (or individual engagements) should be with a key decision-maker (KDM) or a key decision-influencer (KDI) affecting the decision process. Each meeting should be similar in structure. The discussion of the meeting will coincide with the discipline of the client's responsibilities. For example, a meeting with the operations manager will have some topics that are different than when meeting with the customer service manager. The sales team will prepare different questions and focus on elements that are important to the KDI or KDM. Even though the questions and focus may be different for each contact, the structure of the sales visit should follow a flow that is common to all.

The *Sales Visit* should not be confused with the *Sales Process*. The Sales Process is the roadmap that moves a client from "Prospect" to "Implement" (studied later in the text). The *Sales Visit* is one interaction (one meeting) with a client.



There will typically be several meetings to get us from prospect to implement.

This chapter focuses on the Sales Visit. Most corporate sales engagements are scheduled from 30 minutes to two hours. The sales professional's job is to use several engagements (sales visits) to piece together a compelling story for the client to choose one brand over another. Professional salespeople prepare well in advance to have a prosperous business discussion about important topics to the client. The art of the sale is finding the right communication topics and tone as you enter the conversation with the client. Engagements planned around the client and their celebrations and challenges are much more effective than an engagement planned around the sales professional.

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*Sales seeks to understand the client. Marketing helps the client understand the seller.*

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The Sales Process for Corporate Engagement includes negotiations, marketing insights, sales strategy, and tactics; all used methodically to make the sale. The distinction between a marketing presentation and a sales presentation includes the consideration of the situation and objective. Sales seeks to understand the client. Marketing helps the client understand the seller. Both are important and have their place. The Sales Process for Corporate Engagements will help keep sales professionals aligned with fundamentals that lead to success.

### **Professional Self-Precheck**

Before we dissect the Client Sales Engagement, let's check ourselves. We are a representation of ourselves and the firm. In the words of Herb Brooks (played by Kirk Russel) in the great movie *Miracle* (a sports drama about the 1980 U.S. Olympic Hockey team), "The name on the front is a heck of a lot more important than the name on the back!" Meaning your individuality must yield to the team. This sales engagement is not about you. It is not about the "sage on the stage."

Your presentation should be built in a way that you understand the client. Respect for cultures is critical to making the right impression. Do your best. Do your research and be prepared for every visit.

Dressing one level above the others in the room is good practice. Don't use spicy language. Stand when the customer enters the room. Open the door for others to show you respect them. In other words, check yourself before you wreck yourself. Boardroom etiquette has a high-level of respect, mannerisms, and cordial language.

### **Company Leadership**

Company leadership will be departmentalized into disciplines. Common department leaders are discussed in this section. Firms' hierarchies vary. We will consider a typical structure for many firms to practice.

### **Medium to Large Firm Management Structure**

## **C-Suite**

CEO – Chief Executive Officer (Usually has a place on the board, the ultimate responsibility for the firm)

CFO – Chief Financial Officer (Finance, Investor Relations)

COO – Chief Operating Officer (Manufacturing/ Distribution, Supply Chain)

CIO – Chief Information Officer (Technology)

CCO – Chief Commercial Officer (Strategy, Sales, Marketing)

Departments exist under each chief. Usually, the titles start with Vice President and extend through middle managers (example, Operations Manager) and then to team leaders of front-line workers. The structure may appear as the following:



It is essential to navigate the channels to find the KDMs and KDIs. Company cultures vary. Decision criteria and processes need to be vetted by the sales professional early in the sales cycle. Be careful not to get bogged down with individuals that cannot add value to your time and efforts. Navigating

gatekeepers will require a solid message and skill. Organization charts can be of assistance when learning about a new prospect.

## Small Firms

Leadership may play multiple roles in start-ups, or smaller firms focused on a specific niche in the market. One may find that there are fewer sales visits initially due to the ability to get a lot of information about the firm from one or two people.

## Owner-operated

The Owner/President may not have the luxury of a full staff. Leaders may have larger responsibilities that expand across disciplines. There may be only one Vice President that is responsible for staff members. These staff members may be responsible for everything and everyone in that discipline or department. Titles may be used interchangeably.

Finance Manager

- Procurement
- Accounts Payable
- Accounts Receivable
- Company Financial Management

## Operations or Warehouse Manager

- Manufacturing

## Technology Director

- E-Commerce
- General Technology

## Sales and Marketing Manager

- Sales
- Customer Service
- Market Strategy (works closely with President and Vice President)

## Supply Chain Director

- Raw material acquisition
- Inventory
- Transportation/Shipping
- Brokerage (works with finance)

## Targeted Contacts

The targeted contacts (KDM or KDI) will be based on the

information that is needed to understand at this phase of the sales process. Typically, a product or service will dictate this situation. For example, if the sales professional sells lubricants for manufacturing processes, the target audience may be the Director of Manufacturing. The team would not start on the customer service team.

Usually, there is always a financial element to the sale. This suggests that at some point, the sales professional will have to present a return on investment (ROI) to the finance manager or the CFO. Articulating value becomes the spoken language when bridging these sales events. Numbers are always significant, all the time, every time.

## Client Visit Planner

Preparation is key to winning any sales engagement. You must ask yourself, “what value am I bringing to this client today?” If there is not a solid answer, then more preparation must be done. Preparation includes the follow (not a complete list):

- Research of the client, products/services, industry, and competitors
- Financials of the client
- Leadership that you wish to engage (LinkedIn, News, etc.)
- Physical personal touch – go to a customer’s location, try to experience your client’s customer’s experience.

When preparing for the visit, it is important to use a Sales Visit Planner. There are many types of planners – each one fitting a company’s specific sales needs. The one provided is a generic example. This planner will be used during the meeting to keep the sales team on track with the sales strategy.

Elements of the basic client visit planner:

- Objective – This is a clearly defined objective that is the primary goal of the client visit.
- Opening Theme – Delivers a clearly articulated message as to the possibilities of the visit. For example, “During this meeting, the goal is to demonstrate our capabilities that will eliminate primary challenges of operational issues related to stock-outs. Appreciate candor and open discussion as we want to build a long-term business relationship that makes sense for both parties.”
- Questions – These questions will fit the phase of the sales process and the audience that are meeting. The level of questions should be strategic or more tactical depending on the leader within the client organization.
- Marketing Insights – specific data points that tell a story to increase value in the mind of the client. For example, “According to the PEW Institute study dated Mar 17, 2023, 92% of soccer mom’s prefer the TEAMCHAT app over other group chats related to K-8 team sports.”

Client Visit Planner

Company:

Date:

Contact:

Position:

Location:

Email:

Phone:

Objective of Visit/Meeting

Opening Theme

Questions

Marketing Insights

Negotiation Strategy

Notes

Warren Publishing 2022

Stage 1 – Opening

*The opening is critical to the outcome of the engagement.*



*Introductions*

Appearance as a sales professional is expected to match the client. The sales professional attire should also make a statement about your firm's brand. For example, if you are representing a high-level attorney staffing firm, a suit and tie may be in order. If the sales professional is working with boat manufacturers in South Carolina on the coast, it may be appropriate to be in business casual (or even without a jacket).

Demeanor (smiles, positive, professional mannerisms, posture) says a lot about the sales professional. Be always cordial and respectful.

Greeting appropriate (firm handshake, bow)

Thank the client for the meeting. Provide your full name and the firm you represent.

"My name is \_\_\_\_\_. I represent \_\_\_\_\_ (company). I am the solution specialist for \_\_\_\_\_ division or \_\_\_\_\_resources..."

- Present business cards with care. Receive business cards with respect.
- Wait to be offered a seat. Do not sit until the client sits.
- If new members join the meeting, stand to greet them. Then, wait until they sit before proceeding.
- Confirm time allowed and people involved in the meeting.

***Rapport*** (length of time depends on culture). Build rapport

with the client before the business conversation. Best practices would include accolades for the client. “Congratulations on the recent sales award” “I saw the article in the paper regarding your expansion.”

### ***Agenda***

Review agenda and confirm topics with the client. Use a theme statement to explain your desire for a collaborative partnership deliberately. Ask permission to share the document or slide show that will be used in the meeting.

### ***Decision Process and Criteria***

Ask for clarification of the decision process regarding agenda items and those involved. Use agenda topics and confirmation of influencers (people involved in the decision) to BRIDGE into business discussion and gain permission to ask questions to take notes.

## **Stage 2 – Strategic Direction**

### ***Research Reveal and Understand Client Situation.***

Demonstrate knowledge of the client’s firm by referencing research and meetings with other internal personnel or groups – position yourself as a prepared, serious partner. For example, “While preparing for our meeting, I met with your staff as a guest during one of their pre-work meetings. I received some interesting information.” “I also did quite a bit of research on your firm and your competitors. I would like to go through some key points to ensure my understanding so I can serve you better.”

Confirm research and clarify the situation. Probe to verify research and learn more.

- Ask questions to expand knowledge of the client's world.
  - o Current company sales
  - o Position in the market (example, #3 in the market, three locations in the U.S. and two in China).
  - o Locations of manufacturing firms or sources.
  - o Number of employees
  - o Customers served
  - o Client's competition
- Include Marketing Insights regarding the direction of the industry *that strategically positions your firm.*

Leadership Imperatives (these will vary depending on the position of the client)

Ask questions to determine the strategic direction of the client (Top-Line and Bottom-Line KPI – Key Performance Indicators or BSC – Balanced Score Card)

- Revenue oriented questions
  - o Sales growth goals
  - o Mergers and acquisitions
  - o Additional markets
  - o New facilities

- o New products/service offerings
- Cost oriented questions.
  - o Production
  - o Supply chain
  - o Inventories
  - o Service
  - o Quality

**Key Performance Indicators (KPI)** are primary metrics that inform decision-makers of business realities so that decisions can be made that will positively affect the firm's outlook.

**Balance Score Cards (BSC)** are typically metric items for an individual or department with grading to determine performance effectiveness.

### **Stage 3 – Investigate for Challenges**

***Challenge the situation (ask questions related to challenges of the KPIs and BSC).***

Dissection of the client's strategies and processes (one piece at a time) to determine challenges or problems (seen or unseen) is the critical part of the questioning skill that will help you build a business case to articulate the value of the offering.

- “What challenges do you foresee with attaining the sales goals?”
- “Any production bottlenecks or pain points expected with the increase in manufacturing demands?”

Probe at least two levels. For example, “Tell me more....” “Can you explain what you mean by that...” Restate the answer/summarize for understanding/confirm the challenge is clear. Checking for understanding will show the client that you are listening and tracking with the direction of the conversation that is important to them.

Strategic Alignment by ordering the importance of the challenges (client’s order of importance) will send a clear message to the client. Clients have their key priorities based on the order of importance or strategic direction. Successful sales professionals align with the client and repeat the imperatives often.

#### **Stage 4 – Cost Implications – “Indict the challenge, not the client”**

Create Cause and Effect (ask questions to determine the probable cost of the challenges).

The cost impact of a challenge or problem is the core of the value proposition. Sales professionals must determine the cost implications of the challenge. Ask related questions to assess the implications of the challenges. Uncover specific elements of the cost. Some of the cost drivers are as follows:

- # of employees
- Hours worked
- Pay per hour (add fully allocated cost of production)
- Quality rework cost

- Client acquisition cost for lost business (retention of current customers is imperative to your responsibility)

During the Cost Implications Stage, sales professionals will uncover cost figures that is needed to build value for the solution. Some questions examples follow:

Question: “Within the area of the warehouse with concern, how many employees are affected?”

Answer: “4”

Question: “How many hours do these individuals work that is affected during this time?”

Answer: “3.5 hours”

Follow up: “So, four employees at 3.5 hours each is 14 total hours.” “What is the average pay per hour?”

Answer: \$22.50, including insurance costs.

Total Cost Summary

Statement Recap: “\$22.50 per hour times 14 hours equals \$315 per day on average for this challenge. Right?”

Answer: “That is correct. We see on average \$315 times 254 working days, which is \$80,010 annually for this problem that we are having.”

NOTE: Once the client agrees with the cost of the problem,

that number will live throughout the value proposition. Here the example is \$80,010.

**Stage 5 – Propose Solutions or Alternatives (that align with your firm)**

***Conditionally propose offerings.***

At this point in the visit, the sales professional will be considering solutions that will meet the client's challenge. Ask questions to test the client's desire or need for the best-fit solution.

Question: "If I could cut your production time by 10% and eliminate the challenge of \_\_\_\_\_, would you be interested?"

Answer: "I'm not sure. I would need to understand better."

Marketing Insights and Product/Solution Advantages: "Our new abrasive product line has been proven to cut production time and works with your equipment so that there is little to no training. We estimate that we could cut your production time by 13%."

Trades are part of the negotiation process that must enter the discussion.

- Propose trade scenarios that will be part of a more significant deal or relationship.
  - "If you are willing to allow me to position my

product, I would consider....”

- o Confirm the value of your solution in the mind of the client (agree on a monetary value for each offering)
- o Discuss implementation scenarios

Gain agreement from departmental leaders or other KDMs to support your proposed solutions within a more significant Strategic Business Case for the firm overall.

NOTE: Strategy for concessions is critical during this stage (remember negotiation planning). Be sure to plan for what you will receive in return for your proposed solutions. We are reaching a point where there can be no ambiguity in the relationship between you and the client related to your intentions. You are there to make a sale. This is a negotiation. Trades will be part of the process.

### **Stage 6 – Articulate Value of the Business Case (Art of Value)**

The Art of Value may be painted by an elaborate process flow map with engineering time metrics at each segment that shares minutes, \$, people, or some other element that impacts an operation. Or the Art of Value may be a simple whiteboard session that talks through the entire business situation. Students will work on the process of building a business case with a rubric provided by the facilitator. Keep in mind that the beauty of art is in the beholder. Know your audience. Different



methods of presenting are acceptable. It depends upon the situation.

Up to this point, the sales visit flow across managers, regardless of discipline, is the same, except for the topics. For example:

1. Operations
2. Technology
3. Supply Chain
4. Manufacturing
5. *Finance* (Procurement will sometimes require a formal presentation before ultimate leadership)

This typical flow usually will engage leaders in the firm that physically uses the sales team's product or service. Once the sales professional understands the client's business and personal needs/desires, navigate to success by working through the various leaders responsible for parts of the process.

#### Case Scenario:

Company (our company) – Alpha LLC., a maker of drilling tools and bonding agents for laminating wood.

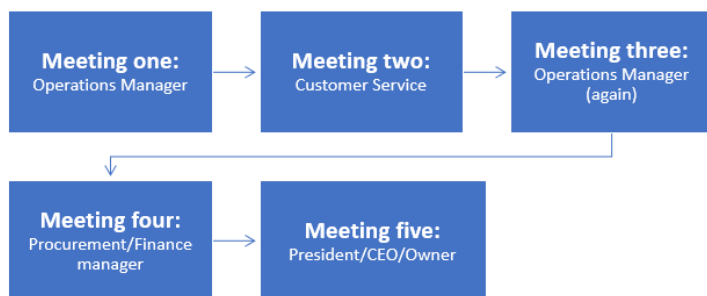
Position – We are an account executive responsible for selling to clients in the cabinet industry.

Prospect – Creative Cabinets specializes in high-end custom cabinetry for homes and businesses. Their product is known worldwide due to their patented production process that uses

large, computerized machines to build cabinet doors with intricate detail within a very short amount of time.

Reason Creative Cabinets is a great prospect – Our firm (Alpha LLC.) has the finest steel and carbide tools in the industry that will work in the Creative Cabinets’ machines.

The Sales Process – We may have a Sales Process Flow that looks like the following (Follow the Flow).



NOTE: Although there were five meetings in the sales process, each sales visit had similar stages or interactions. See the following examples:

Meeting 1: Operations Manager – Gain a first meeting with the operations manager to determine the viability of the prospect. Gain information about their goals and learn about the decision-makers in the firm.

Meeting 2: Customer Service – Meet with customer service to determine if there are significant challenges with the product (which would insinuate there are problems with the tools in production).

Meeting 3: Operations Manager – Meet again with the operations manager to share the detail from customer service and address the challenges of quality and determine the implications of the quality issues.

1. a) Indict the challenges to determine implication costs.
2. b) Propose Solutions and build the value of your product in the mind of the client.

Meeting 4: Procurement/Finance Manager – Meet with the finance team to discuss the challenges that you have uncovered and solutions you have provided, and gain information from the perspective of the finance team regarding overall cost. Focus on the overall value of your offering. Be careful not to get pulled into a price discussion too early.

Meeting 5: President/Owner/CEO – Presentation built with the approval of the key influencers. This presentation will be about the Current State and Future State with Revenue and Cost improvements.

Consider that the team is currently in Stage 6, Articulation of Value, for the scenario with a VP of a small firm. The following is an outline of a possible discussion....

### **Presentation (PowerPoint)**

- Agenda (Confirm agenda aligns with the client).

- Objectives (Be transparent in your desire to create a partnership).
  - o State objectives of the meeting.
  - o State understanding of the firm's goals and direction of the organization (short-term and long-term).
- Current State and Issues (Dangers to current situation if not changed).
- Future State (with cost elements or lack of revenue) and Solutions (Benefits to change).
- Value of the proposal in the client's terms.
- Revenue and Cost Overview – confirm the numbers are accurate.
- Propose to move forward and Close the Deal (gain advance with a firm date and time if more meetings are needed).
- Present Implementation Plan (includes both parties) and confirm the date of completion.

### **Negotiate terms of agreement (including price)**

- Protect self-interest.
- Trade for collaboration (charge more for desires than needs satisfaction).
- Use your pre-meeting, planned concession strategy to guide you (see negotiation planner).

## **Overcoming Objections**

- Ask questions to understand.
- Confirm/Restate the customer's point for clarity.
- Restate the value proposition.
  - o Pause for customer agreement.
- Ask if you have resolved the concern.
- If persistent or detrimental to the deal, propose an alternative to satisfy the need.
  - o If non-related to the agreement, defer to another meeting.

### **Stage 7 – Closing the Deal**

#### ***Proposing to move forward.***

Once the value has been articulated, negotiations have taken place, and objections have been overcome, to confirm that the client agrees with the overall business case.

Provide a summary of the meeting and test the client's willingness to buy.

- Address any concerns or questions.
- Ask for a commitment from the client to move forward with the implementation plan.
- Present the document to close (the first step in the implementation plan is to sign the agreement).

Implementation Plan Example – In some cases, the

Implementation Plan may require a Project Manager with a more robust tool for tracking the process to completion. Implementation plans are covered later in the text.

### **Rubric for Sales Visit (college competition)**

University Sales Competitions use an elementary rubric assessment form to judge students during the role plays. The highlight areas are as follows:

1. Meeting Opening (5%)
2. Needs Identification (40%)
3. Presentation (15%)
4. Overcoming Objections (15%)
5. Gain Commitment (10%)
6. Professional Communication (10%)
7. Credible and Trustworthy (5%)

**Chapter Overview** – YouTube channel

3.

## CHAPTER 3: SALES ENGAGEMENT PROCESS - PIPELINE (FUNNEL)

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The Sales Pipeline (or funnel as it is commonly named) is the organization's roadmap that tracks a client from "Prospect" to "Implement". It can be the indicator of life or death of the organization.

The process includes positioning a prospective client into the "pipeline" so that the sales team and leadership can maintain a sales focus through sales engagements to the point where the business is "won" or "closed lost" (meaning – we decided to not continue the pursuit of the business, or we did not have a convincing value proposition and a competitor won).

Pipeline stages may look slightly different depending on the industry or firm. The differences will largely be due to internal metrics of the sales leadership team. However, overall, the process and fundamentals of the pipeline is the same regardless of the organization.

For the study of this most important aspect of sales and

sales management, the text will use a pipeline with commonly recognized stages. Much study will be given to the understanding of each Phase of the Pipeline as well as the metrics for managing the business of sales. It is a primary goal for students to be as skilled as a sales manager regarding the sales process and metrics that make up the pipeline and forecasting.

### **Pipeline (Funnel)**

The sales pipeline is called pipeline because of its resemblance to a pipeline or funnel filled with fluid and as fluid moves through the pipeline, it is released at the end point (realized as producing revenue). The Pipeline can be referred to as targeted companies or as the revenue opportunity that we are pursuing.

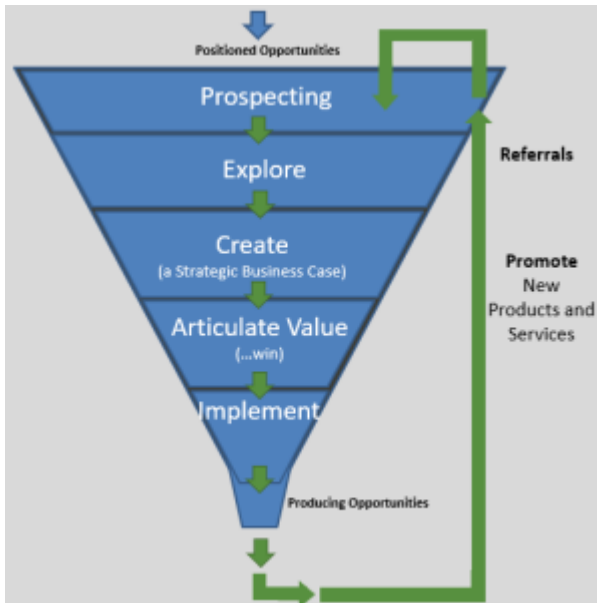
Sales managers refer to the pipeline containing companies (opportunities) and revenue. For example, Sketobe Enterprises may be a firm that we are trying to win. The annual revenue for Sketobe is \$1.2 million. A sales manager may ask, “How are the talks going with Sketobe?” The sales professional would respond, “Currently Sketobe is in the Explore Phase of the pipeline for \$1.2 million. Our meeting on Thursday went very well. We have a follow up on Monday to discuss the warehouse management process.”

Notice how the Pipeline guided the discussion for the management team. The message was concise and clear. The manager has a good idea of the situation (at a high level). If



more needs to be discussed about the strategy, the manager would have a follow-up question (we will study strategy later in the text).

The process of the Pipeline will be professionally performed using a Customer Resource Management (CRM) system. One may commonly recognize firms like Salesforce.com for this tool.



### Phases of the Sales Process

The Sales Process is broken down into distinct phases. These phases do not necessarily correlate to the Sales Visit flow. However, these may run in tandem depending on the timeline of the actions of the sales team and the client.

Where to start, this is where you need to slow down to speed up. Meaning, if the sales professional doesn't get this right,

they will spend all their precious time on clients that may not produce. Successful sales professionals understand that there is a long- and short-term strategy related to the Pipeline. There is a “Hit Rate” (discussed later in the text) that we need to understand. There are profitability elements to consider. There are cost elements to consider. For example, would we travel to a client and spend two days when we could have stayed in the city and visited with three opportunities? The answers are always...it depends. We must give research and thought to the “it depends” factors. A sales professional’s time and territory management are as important as the clients in the pipeline. Without prioritization skill related to the territory and time, the sales professional can find themselves practicing bad habits.

The act of Prospecting can be an arduous task. Many firms hire niche players to pre-qualify opportunities so that they focus their valuable time on real, viable opportunities. Viable means that the opportunity that we are positioning for the Pipeline has everything that we are looking for in a client. The client has the potential to buy at the level that we need and the KDMs are open to discussing a potential agreement.

Homeruns are great. But base hits win games. This metaphor speaks to the anxious sales professional that spends too much time with the large complex sale while leaving out the client base that can facilitate strong company growth. The large fish are more longer-term targets. They are very important and must be pursued with vigor. However, the

medium to small fish still fries up quite nicely to put food on the table for the organization. The moral of the story is to maintain a balance of long- and short-term targets.

Positioning the right client into the Pipeline should meet the criteria of the following:

- Viability – the opportunity is real and verified to be interested (and not contractually bound to another).
- Decision – has the capability to make or heavily influence a decision to make a deal.
- Profitability – the firm meets your operational cost structure to serve.

Sales success takes *Cadence*. Meaning, we must maintain a continuous flow of new opportunities through the Pipeline to support the organization. There should be a balance to the number of opportunities within the Pipeline Phases. *Pipeline Balance* allows us to forecast new revenue to the team in a succinct manner. For example, based on current market conditions and our historical hit rate, we forecast \$1.2 million new business to produce in March, \$500,000 in June, and \$1.4 million in August.

Phases	Process defined
<b>Prospect</b>	In the first Phase, Prospect, you will identify the opportunity you are going to target. Research and plan for the initial engagement, contact the prospect, and get an appointment with them. Prospects are viable opportunities that are within your target market.
<b>Explore</b>	In the second Phase, Explore, you will develop engagement plans for the key contacts, interact with them to uncover information about the customer's business goals, strategic plans, and the challenges they face as well as the financial implications of their situation. Assess the opportunity related to needs, revenue, and time.
<b>Create a Strategic Business Case</b>	In the third Phase, Create a Strategic Business Case, you will develop a value proposal for the customer after aligning solutions that best meet their needs. Quantify the benefits of solutions and establishing the pricing agreement. Plan for negotiations (concession strategy). Discuss the development of the implementation plan.
<b>Articulate Value and Close (Win)</b>	In the fourth Phase, Articulate Value, you will present the value proposal to the customer, address their concerns and objections, handle negotiations (including price), and gain agreement on the value proposal.
<b>Implement</b>	In the fifth Phase, Implement, you will finalize the implementation plan and ensure the full adoption of the solution in the customer's organization. Align your firm's resources for full support of the sale. Verify negotiated elements are fulfilled.
<b>Promote</b>	In the sixth Phase, Promote, you will confirm new revenue and pursue full adoption of services, expand customer relationships, anticipate changes and new decision makers, communicate ongoing value, and seek the next opportunity.
<b>Referrals</b>	In the seventh Phase, Referrals, you have attained trust and credibility. You are seen as a true business partner. The client assists in new revenue streams for your firm.

## Role Play

This role play is provided to help you learn how to properly introduce yourself to a client. Students will perform an individual exercise of personal introduction.

Prepare for your message. Then video your introduction. Upload to your facilitator. You will receive personal feedback based on the interaction of the recording. Work hard to make it as real as you can. Use your best judgement.

### RULES:

- Prepare – 10 minutes
- Introduction should take approximately 3 minutes (video the process – check your audio and video settings prior to the role play.)
- Upload Video per facilitator instructions

Scenario notes: You are a student working for the University of North Alabama. You are selling a sponsorship discount program called Mane Benefits. Act as if you have a business card stating the purpose of your visit. The client is expecting you (you have a firm appointment). Act natural.

### **Phase 1 Prospect**

In the first Phase, *Prospect*, sales professionals will identify the opportunity they are going to target. Research and plan for the initial engagement, contact the prospect, and get an appointment with them. Prospects are viable opportunities that are within the target market.

- Prioritize targets.
- Research and plan for initial contact.
- Prepare sales message/marketing theme.
- Contact prospects to obtain meeting.
- Secure specific date, time, and agenda.

The first meeting in the sales process is usually mostly informative related to contacts, responsibilities, and business output (what the firm does at this location). First impressions are always important. As with any personal engagement, keeping it light related to the job may be a plus. The objective of the prospecting meeting is to get a “lay of the land” and determine what the next steps should be to explore the firm as a real candidate for doing business.

Being prepared with marketing information about the sales team's firm is one of the critical pieces of this phase. Professionalism and personality will go a long way to ensure you get a contact for the next meeting.

For most sales professionals, *contacting the CEO for the first visit is not a good strategy*. If the business is medium sized to small, the CEO may be the right place to start so that the sales team can gain permission to have business conversations with the influencers.

Prospect meeting opening statements and questions may be as follows:

- Sales Professional (SP) – “Thank you for the video meeting, I understand that you have 10 minutes. Is that right?”
- VP – “Yes, I have another meeting at 10:00. What can I do for you?”
- SP – “I am responsible for client relations within the southeastern United States for BM Petroleum, the nation's largest supplier of manufacturing lubricants. I would like an opportunity to get to know you and your staff to determine if my firm and I can cultivate a partnership here at CBA corporation.”
- VP – “Well, we appreciate your inquiry. However, we already have a relationship with a provider.”
- SP – “I understand. We are the nation's leader because we focus on customer service and the highest quality

products. Our sales teams are skilled in manufacturing. I am an industrial engineer by education. I know that your business is very successful. However, it is rare when I can't find some way to assist a company like yours. I would like an opportunity to meet with several of your team members including the operations manager and maybe your team leader. If I find some challenges that we could resolve for your firm, I would like to get approval to present a proposal to you and your staff regarding our capabilities and a future partnership. If I don't identify any areas, that will simply add confidence to your team's performance."

- VP – "I will set up an introduction to meet our operations manager for the manufacturing division. Keep me informed as to any progress. I am interested regarding whether you find anything to improve."
- SP – "Thank you. How does Tuesday, the 27th at 2:00 pm look on your calendar?"
- VP – "That works."
- SP – "Great, I will send an invite as well as an agenda. Please add anything that is of importance to your team to the agenda. I appreciate the time and look forward to our next meeting."

## **Phase 2 Explore**

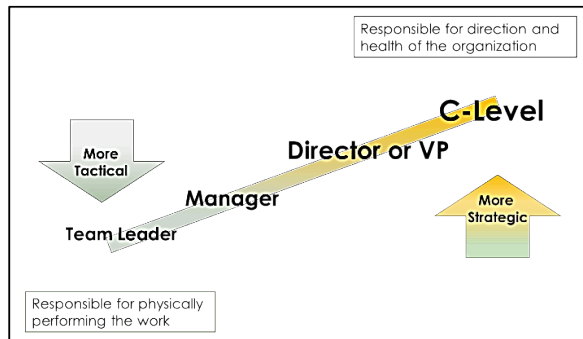
In the second Phase, *Explore*, sales professionals will develop

engagement plans for the key contacts, interact with them to uncover information about the customer's business goals, strategic plans, and the challenges they face. Assess the opportunity related to needs, revenue, and time.

- Identify key decision makers/influencers
- Seek strategic and tactical knowledge (who does what, when, and how?)
- Uncover challenges and develop needs (why?)
- Determine cost implications (how much?)
- Use marketing Insights to position your product/service with an advantage over your competitor
- Assess and size opportunities

### *Identifying Key Decision Makers and Influencers*

#### **Strategic and Tactical Contacts**



In this phase, sales professionals will develop a call plan and identify key players and decision makers in the customer's organization. Successful sales professionals qualify the



contacts position early in the sales process. Each person in the organization is important. Sales professionals must concentrate time on the KDMs and KDIs.

Influencers can reach from Team Leaders all the way to the C-Level. Skilled sales professionals ask questions to determine the nature of the contact's responsibility related to the sales professional's industry or product. Questions related to determining the range of tactical or strategic influence may be as follows:

1. "Who should be involved in the process of discussing the challenges with...?"
2. "Who is involved in the decisions to make a change related to...?"
3. "If we were to begin serious discussions, is there anyone else that we will need to be informed?"

### ***Develop a Call Plan***

Developing a call plan begins with understanding the position of the contact within the organizational structure as it relates to influence and decision-making. Once the sales professional has identified the contact for the meeting, the development of questions is critical to success.

Every phase should begin with research. Researching the contact is basic-level importance. Social media platforms like LinkedIn are a good place to start to learn more about your contact. The client contact's history can provide a wealth of

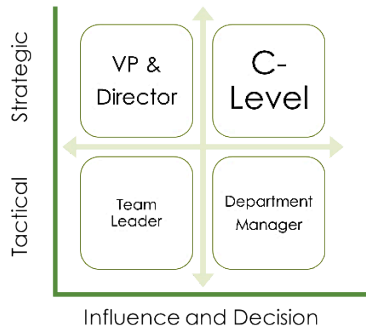
knowledge for preparation, especially as it relates to building rapport. Proper building of rapport in the first five minutes of the meeting can make or break the entire sales process. Preparedness is key.

Seek strategic and tactical knowledge (who does what, when, and how?)

Once rapport is prepared, build questions that are appropriate to the position of the contact. Questions for the C-Level will be more strategic in nature than the Team Leader. Team Leaders' responsibilities are more tactical in nature. The Team Leader may not know the projected three-years sales for the organization. But he or she may know how your product or service will specifically affect the operation line. Both sales and operational impacts are very important to the sales process. Knowing how to position the questions and whom to ask is part of the process that brings success.

Getting meetings with contacts of both tactical and strategic within the organization will allow the sales team to build a better value proposal. Examples of strategic and tactical questions are as follows:

### Strategic and Tactical Questions



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#### ***Strategic***

- C-Level – “How is the looming recession affecting your decisions for future acquisitions?”
- VP & Director – “How will the change in cost of capital due to interest rate hikes affect your hiring plans in the short term?”

#### ***Tactical***

- Department Manager – “What elements on your Key Performance Indicators (KPI) or Balance Score Card (BSC) are receiving the most pressure at this time?”
- Team Leader – “How is the current shortage in lubricants affecting your assembly line processes?”

Each of these questions is important. However, they are very different in nature. The sales team must have these questions

prepared in advance of the sales visit and ensure that the nature of the question is appropriate to the audience.

Tactical questions get answers related to processes that will be used to build the business case for the sales teams' product or service.

Strategic questions uncover the direction of the firm and the vision of the leadership. Often, this point is overlooked. Leaders are looking for strategic partners. The sales planner must contain questions that are both strategic and tactical.

***Uncover challenges and develop needs (why?)***

*Within the context of the Sales Process (may be different than the Sales Visit), the sales professional is developing the needs of individuals and the organization. While the individual Sales Visit is focused on the person that you are currently meeting, the Sales Process will be a culmination of the multiple people and visits to put the challenges and cost implications together in a business case so that the entire picture can be determined.*

The sales team business case may have information as follows:

CBA Corporation Primary Challenges

Contact	Challenge 1	Challenge 2
COO	Supply Chain – China	Inventory On Hand
VP Operations	Inventory On Hand	Manufacturing Defects
Operations Manager	Manufacturing Defects	Lubricant Availability
Team Leader	Lubricant Availability	Employee Training

The challenges may build upon each other as in the chart above. The sales professional is responsible for listing the challenges in priority of importance to the client. Part of the prioritization process is determining the cost implications of the challenges.

Determine cost implications (How much?)

A “Defining Value” cost worksheet example is provided below:

Defining Value

Evaluating the client's process

Customer Challenges

PHASE 2

Are the challenges Tactical or Strategic?

# Hours

Wages (\$)/Hour

Frequency

Misc.

Current Process Cost

Proposed Process Cost

Savings

Solution Positioned

PHASE 3

Ask questions to build a business case that determine cost implications. Propose solutions that solve the customer's problems with savings that is mutually acceptable to all parties in the negotiation.

Worksheet Notes

Total Estimated Current Processing Cost

Estimated Impact of the Solution

Annual Potential Savings (mutually agreed by client)

During phase 2 and 3 of the sales process, you will quantify

and qualify the opportunity. As you work to fill out information that moves you into the next phase.

### **Phase 3 Create a Strategic Business Case**

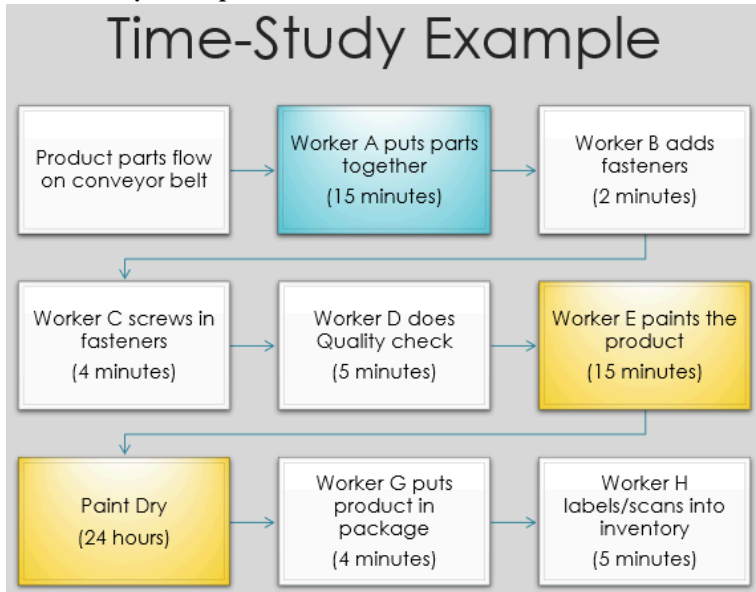
In the third Phase, *Create a Strategic Business Case*, sales professionals will develop a value proposal for the customer after aligning solutions that best meet their needs. Quantify the benefits of solutions and establish the pricing agreement. Plan for negotiations (concession strategy). Discuss the development of the implementation plan.

- Align company solutions and resources.
- Quantify value in customer terms.
- Develop strategy and key objectives.
- Create value proposal.
- Discuss implementation plan development.
- Anticipate dangers of the situation.
- Prepare a negotiation planner.

Current Process and Proposed Process should always be part of the business case. Many firms use Industrial Engineering to model the process. Industrial Engineers can provide time-studies of processes to determine the true cost. For example, if a production line has six employees and there is a process within their assigned duties that causes a pause or rework by an employee, the time for the process, including the rework,

must be accounted for to determine the true marginal cost of a product or service.

Time-study example:



The sales team may identify three areas that could be a focus of concern. Worker A, E, and the Paint Dry steps in production of the product is where we can position ourselves. After discussing processes with the client, we may conclude that Worker A is outside of our expertise. However, the painting of the product is where we can have a significant impact on the client's operation. The client is having production "down time" due to the paint taking more than the planned time to cure.

The client is using a high-quality paint line that is known for its durability. But the time to dry during production can be improved if the customer were to consider our solution. We

sell a **paint additive** that increases the drying time by 50%. In addition, we can install “**no-noise” drying machines** on the line that will cut the overall dry time to only four hours – an 83% improvement to the paint-drying process.

As you are positioning the solutions, add the paint additive and the drying machines to your defining value worksheet; ultimately to your formal presentation that will be presented in Phase 4. During the next phase, will articulate the value of the 83% savings in dry time. There must be a monetary value put on the cost of the 24 hours of dry time. How would an 83% dry time help the operation? What if you can eliminate the downtime related to drying? Use the overall savings to position your product and sell the customer.

#### **Phase 4 Articulate Value and Close**

In the fourth Phase, *Articulate Value and Close*, you will present the value proposal to the customer, address their concerns and objections, handle negotiations (including price), and gain agreement on the value proposal.

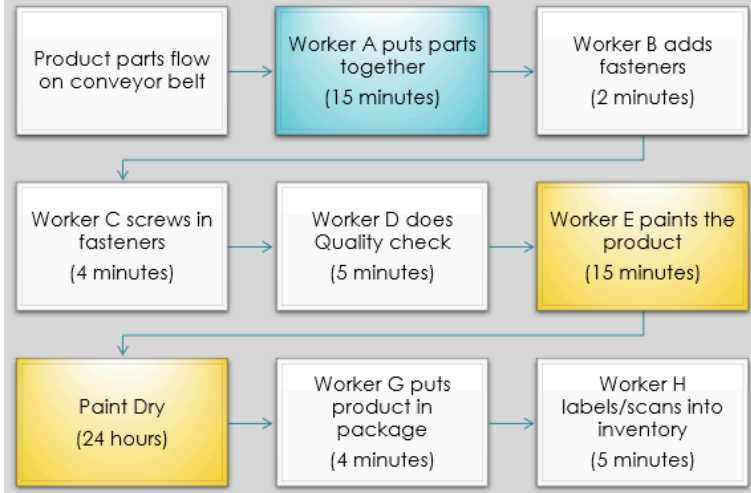
### **Current State / Future State**

We will present the **Current State** and the **Future State**. In the case of the production line, it may look like the following:

#### **Current State**

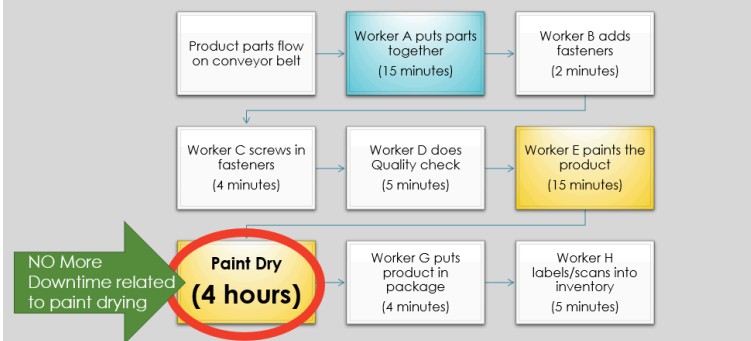


## Time-Study Example



## Future State

### Future State: Time-Study Example



## **Marketing Insights**

Marketing insights are bits of real research that substantiates your claim and helps position your product or service higher in the mind of the customer. The following are a couple of examples:

- “Scientist from leading universities demonstrate in laboratory research and confirmed with fortune 50 companies that our Prime-Time paint drying machines cut drying time by 83% on average compared to other manufacturing processes.”
- “9 out of 10 production managers chose the Prime-Time paint drying unit over the next leading paint drying process.”

Articulating the value is the foundation for the sales process. Position power in the negotiation by showing your understanding of the current process and demonstrating your solution that overcomes the challenge.

Using the marketing insights, on-site testing with the client, and cases from other third parties will allow the sales team to ***Propose to Move Forward***. It is at this point that the sales team may encounter an objection.

Defining Value

Defining value only comes through effective questioning and meeting with the right influencers. Once the sales team has investigated the situation and determined appropriate solutions, the processes and cost should be mapped out in a methodical, easy-to-understand document that tells a positive story and puts the solution in a position of value and power. The excel worksheet below provides an example of how building a case for process improvement will articulate value.

The data points from the client are used to “walk through” the process improvement and potential savings. These numbers must be verified with the key influencers and decision makers to be effective.

Note: if the sales team is diligent through the process of building the business case, the articulation of value flows with the presentation.

Defining Value									
Evaluating the client's process									
Customer Challenges	# Hours	Wages (\$/hour	# of Employees	Frequency (ex. # of Days annually)	Misc.	Current Process Cost	Proposed Process Cost	Savings	Solution Positioned
Paint Drying Downtime	2	\$ 35.00	12	160		\$ 134,400.00	\$ 70,000.00	\$ 64,400.00	Two Drying Machines
Paint Additive					Product	\$ 20,000.00	\$ 18,000.00	\$ 2,000.00	Paint Additive
Worksheet Notes									
Downtime cost 2 hours per day for 160 days within the year. There are 12 employees on the line with an average wage of \$35 per hour.						Total Estimated Current Processing Cost \$ 134,400.00			
Our drying machines cost \$35,000. The customer needs two.						Estimated Cost of the Solution \$ 88,000.00			
[Current cost \$134,400 - \$70,000 for two of our machines, leaves an annual savings of \$64,400.]						Annual Potential Savings Impact \$ 66,400.00			

## **Handling Objections**

Objections may be legitimate rejections from the client due to not understanding the full value of the sales team's value proposition. Objections may also be a tactic used as a negotiation tool to drive down the price. It is important to clarify the situation through a series of questions.

1. Ask questions to better understand the objection.
2. Restate for clarity.
3. Respond with a focus on the value of the proposal, restating the primary elements of the solutions and the overall cost savings or benefits.
4. Ensure the responses are appropriate and helpful to the client's understanding.
5. Confirm that the objection is resolved and is not a barrier to moving forward.

As with the discussion during the client visit portion of the text, if an objection continues, defer the meeting with an advance so that the issues can be resolved with more investigative work.

## **Negotiate terms and conditions**

Follow the planned concession process as planned prior to the meeting with the client.

- Anticipate tactics/strategy/dangers.
- Negotiate in good faith for all parties while protecting the profit of the team.
- Make trades that will bring the parties together for a deal.
- Propose a CLOSE and gain agreement to move forward.

### **Phase 5 Implementation**

In the fifth Phase, Implement, finalize the implementation plan, and ensure the full adoption of the solution in the customer's organization. Align firm's resources for full support of the sale. Verify negotiated elements are fulfilled.

- Finalize implementation plan.
- Sign agreement (1st Phase in the implementation plan).
- Engage your company resources.
- Customer training.
- Anticipate competitive response.

Implementation Plan

Company:

Date:

Contact:

Position:

Location:

Email:

Phone:

Implementation Overview

Client		
Responsibility	Contact	Completion Date

Sales Company		
Responsibility	Contact	Completion Date

**Phase 6 Promote**

In the sixth Phase, Promote, confirm new revenue and pursue full adoption of services, expand customer relationships, anticipate changes and new decision makers, communicate ongoing value, and seek the next opportunity.

- Confirm new revenue and pursue full adoption.
- Expand customer relationships.
- Anticipate changes and new decision makers.

- Communicate ongoing value of the agreement and seek next opportunity.
- Quarterly Business Reviews (KDM Level).

### **Phase 7 Referrals**

By the seventh Phase, sales professionals have attained trust and credibility. The team is seen as a true business partner. The client assists in new revenue streams for the firm.

- Referrals to introduce new clients to you and your firm.
- Business Cases for recognition of key players.

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## 4.

## CHAPTER 4: SALES METRICS

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Hit Rate is a common term used to determine a percentage of wins versus attempts. Hit rate measures the effectiveness of the sales team (member) sales efforts related to the number of prospects approached. A higher-than-average hit rate suggests the following:

- Prospecting leads are from an effective source or process.
- The ability of the sales team is typically more effective.
- Market conditions favor the team.

The hit rate is important because it is a foundational element to understanding the science of sales. Sales-math is a term used to describe the analysis (including a “gap” analysis) used to help the sales team understand the urgency and critical nature of having a good process for prospecting. Consider the following, how do you know how many prospects are enough to target to make the sales plan? The sales team must be prepared to target a market based on the number of attempts on average it takes to make a sell. See the example.

### Hit Rate Metric Example

Assume it is January and you just received your plan. Your last year actual was \$5,000,000 and your plan contains an 8% growth requirement. Additional data you'll need follows:

- Prospect - \$750,000
- Explore - \$360,000
- Create Business Case - \$214,000
- Articulating Value - \$63,000
- Implementing/won (Producing) - \$369,000

Answer the following questions:

1. What is our Hit Rate?
2. What is the Revenue amount that we are expected to grow (Business Plan)?
3. Based on the Hit Rate you calculated and the Revenue you are expected to grow, how much do you need in the Pipeline if this were the beginning of a new planning period?
4. Write your answers and be prepared to share.

A funnel diagram representing the sales pipeline. The funnel is divided into five horizontal sections: Prospect, Explore, Create Business Case, Articulate Value, and Implement. Above the funnel is a box labeled 'Marketing Opportunities' with an arrow pointing down into the 'Prospect' section. To the right of the funnel is a box labeled 'Revenue' with an arrow pointing up from the 'Implement' section. Below the funnel is a box labeled 'Marketing Opportunities' with an arrow pointing down into the 'Prospect' section. The funnel is blue with white text. The 'Implement' section is highlighted in green.

<b>Hit Rate:</b> Prospect + Explore + Create + Articulate + Implement = Total Opportunities $\$750,000 + \$360,000 + \$214,000 + \$63,000 + \$369,000 = \$1,756,000$ $\$369,000 / \$1,756,000 = 21\% \text{ Hit Rate}$	<b>Business Plan:</b> Last Year Actual x % Growth Requirement = This Year Plan $\$5,000,000 \times 8\% = \$400,000$
---	---

**Elementary Pipeline Metrics:**  
Based on a business plan increase requirement of \$400,000 and the fact that we have a Hit Rate of 21%, we would need the following in the pipeline in order have a plan for success:  
 $\$400,000 \text{ (bus plan increase required)} / 21\% \text{ Hit Rate} = \$1,904,761.90$  [we need \$1.9M in the pipeline based on the current hit rate]. We currently have \$1,387,000 in Prospect+Explore+Create+Articulate. We need an additional \$517,761.90 quickly to position into Prospect.

Assume it is January and you just received your sales plan. Your last year’s actual was \$5,000,000 and your sales plan contains an 8% growth requirement. Additional data needed follows:

- *Prospect* – \$750,000
- *Explore* – \$360,000
- *Create Business Case* – \$214,000
- *Articulating Value* – \$63,000
- *Implementing/won* (Producing) – \$369,000

Answer the following questions:

1. **What is Hit Rate?**

*Prospect + Explore + Create + Articulate + Implement = Total Opportunities*

$\$750,000 + \$360,000 + \$214,000 + \$63,000 + \$369,000 = \$1,756,000$

$$\text{\$369,000} / \text{\$1,756,000} = 21\% \text{ Hit Rate}$$

**2. What is the Revenue amount that the team is expected to grow (Sales Plan)?**

Last Year Actual x % Growth Requirement = This Year Plan

$\text{\$5,000,000} \times 8\% = \text{\$400,000}$  growth plan over last year. Add the growth plan to last year's (LY) revenue and that gives us this year's (TY) sales plan of  $\text{\$5,400,000}$ .

**3. Based on the Hit Rate you calculated and the Revenue you are expected to grow, how much do you need in the Pipeline if this were the beginning of a new planning period?**

Based on a business plan increase requirement of  $\text{\$400,000}$  and the fact that we have a Hit Rate of 21%, the team would need the following in the pipeline to have a plan for success:

$$\text{\$400,000 (bus plan increase required)} / 21\% \text{ Hit Rate} = \text{\$1,904,761.90}$$

The sales professional needs  $\text{\$1.9M}$  in the pipeline based on the current hit rate. Currently there is  $\text{\$1,387,000}$  in Prospect+Explore+Create+Articulate. An additional  $\text{\$517,761.90}$  quickly to position into Prospect.

As an elementary view into sales planning, this process gives insight into a sales professional's need to prospect effectively.

High quality prospects will yield a better hit rate and therefore less prospects are needed to win.

### **Sales Metric Definitions**

**Sales Plan:** Sales plan is the growth metric over the previous year or quarter that suggests a standard of achievement required by the team. Usually, the sales plan is expressed as a percentage required growth over last year. For example: Last Year (LY) we sold \$1,000,000. We have a plan increase of 10%. So, this year our plan is \$1,100,000 (LY + This Year's required increase).

**Churn:** The reduction in revenue due to lost customers.

**Closed:** No deal is better than a bad deal. If a deal cannot be made with the client, the opportunity is removed from the pipeline and put into a closed/lost repository for review with the marketing and sales management team. It is important to do a postmortem examination of why the sales efforts were not successful. In many cases trends can demonstrate competitive disadvantages within a territory or with a certain product or service.

**Hit Rate:** Hit rate is represented in a percent format. It is calculated dividing the total producing opportunities in the last 12 rolling months by the sum of all active positioned opportunities. It is intended to demonstrate the average percentage of all positioned opportunities which have historically moved to Implementation for a given business unit or salesperson. The number is represented as a percentage of opportunities and a percentage of revenue.

**# Opportunities per Phase:** This is the total number of potential clients currently in a particular phase of the Pipeline. The sales professional must drill down into the Pipeline to determine how many actual accounts are being targeted. The number of opportunities within the phases are an important metric for future success. There should be continuous movement of opportunities through the pipeline phases driven by the efforts of the sales professional.

**Velocity:** Velocity is a measurement of the average time in Business Days it has taken for all producing opportunities in the last 12 rolling months to move from Prospect to Implementation. This is calculated by taking the sum of business days from Prospect to Implementation for all producing opportunities in the last 12 rolling months and dividing by the total number of producing opportunities in the last 12 rolling months.

Customer Resource Management (CRM) tools provide all of the sales metrics within an easy to use platform that includes dashboards for easy analysis. Using internet search engines to view the latest tools by Salesforce, Microsoft Dynamics, Oracle's NetSuite are great examples of what is possible for sales teams.

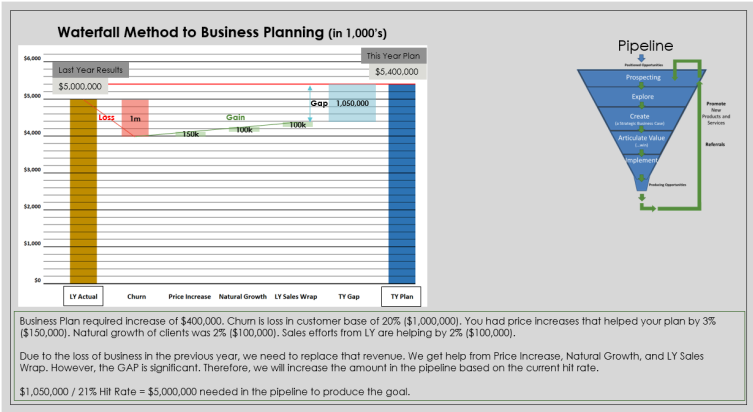
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5.

# CHAPTER 5: SALES/ BUSINESS PLAN

Understanding elementary sales planning will help the sales team think through future sales activities. The waterfall chart below gives insight into the ups and downs of managing the customer base.

Organizations build plans upon how the company has performed. Rarely will a firm ever plan for less revenue than the previous year. So, even for the territories that may experience churn (loss customer base), the plan will still be there based on the overall revenue from the previous period measured.



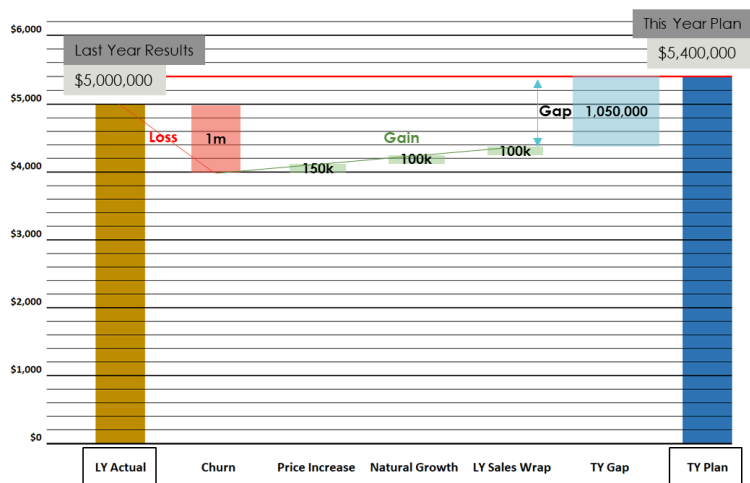
## Gap Analysis

The Sales/Business Plan for the example below requires an increase of \$400,000. Churn is loss in customer base of 20% (\$1,000,000). There was a price increase that helped the plan by 3% (\$150,000). Natural growth of clients was 2% (\$100,000). Sales efforts from LY are helping by 2% (\$100,000).

As the team works through the numbers of the goal required and all the impacts, both positive and negative, that can affect results, the “gap” reveals the true efforts that the sales team must undergo to achieve the plan.

See the **GAP** in light blue on the waterfall chart. There is a \$1,050,000 new goal that the sales professional must strive to achieve. The sales team is responsible for making up any loss that occurred due to churn.

Commonly, during earnings reporting, the CFO will report the current year’s sales numbers and the expected growth of the firm. Rarely is there an allowance for the sales team to suggest a decrease in revenue expected for the new year.



In the example, the sales team must make up a gap of \$1,050,000. Therefore, the team will perform the math based on the hit rate. Due to the loss of business in the previous year, we need to replace that revenue. We get help from Price Increase, Natural Growth, and LY Sales Wrap. However, the “GAP” is significant. Therefore, we will increase the amount in the pipeline based on the current hit rate.

$\$1,050,000 / 21\% \text{ Hit Rate} = \$5,000,000$  needed in the pipeline to produce the goal.

Although the task may seem daunting at first math, the team must stay focused with a positive mindset to find the prospects and target new revenues.

When building territory business plans, there will be inclusion of economic factors by territory. For example, in the chart below there is geographical GDP growth data. The GDP data provides insight into the growth of the geographical data overall for the territory. Sale management will consider GDP



growth data when preparing sales goals for the next planning period.

### Calls per Day/Hour

Part of the responsibility of the sales professional is to ensure there is sales related activity that fills the day of the sales team. Just like with the hit rate when a salesperson is engaged with a viable opportunity, there is an average “calls per day/hour” that is required to achieve the number of viable opportunities to enter the pipeline. The following is an example of common sales organizations:

Josh and Kris need to increase the number of prospects in the pipeline. Burt is a little low in the Build and Articulate phase. Currently the entire team is responsible for making 12 calls per hour to prospect clients to determine if they are viable targets to put in the Prospect phase of the pipeline.

Inside Sales Team	Carry	Josh	Burt	Kris
<b>Years of Service</b>	<b>2</b>	<b>4</b>	<b>3</b>	<b>2</b>
<b>LY Revenue Base</b>	<b>\$ 155,000</b>	<b>\$ 137,000</b>	<b>\$ 126,000</b>	<b>\$ 90,000</b>
<b>Prospect</b>	12,000	8,000	16,000	7,500
<b>Explore</b>	7,500	6,000	4,500	2,500
<b>Build Business Case</b>	5,000	8,000	5,000	5,000
<b>Articulate Value</b>	7,500	4,500	3,000	4,000
<b>Implement</b>	14,000	10,000	8,000	5,500
<b>Total</b>	46,000	36,500	36,500	24,500
Average calls per hour	12	10	9	7

Observation of the report tells us that Carry is attempting 12 calls per hour. As a result, she is trending with the most

opportunities that are new to the pipeline in the Prospect phase. The other three are not fulfilling their obligation to the team and therefore must be addressed to determine reasons for poor performance.

**Making the Sales/Business Plan**

When determining an appropriate sales plan, there are key components. One very important piece of the plan is historical data. Sometimes the data is segmented into geographical areas and/or industry segments (healthcare, manufacturing, etc.).

For example, in the chart below there are four key markets within the southern Atlantic region of the U.S. Notice the growth trends for the territories. These trends should hold weight for the algorithm used in the planning process.

Annual Territory Trend				
Year	Nashville	Huntsville	Birmingham	Memphis
2022	3.0%	2.7%	2.9%	2.7%
2021	2.7%	3.0%	2.5%	2.0%
2020	2.6%	2.9%	2.3%	1.8%
2019	3.2%	3.2%	2.6%	1.3%

The performance report of the individual (by territory) will give a good understanding of the current sales situation and the results of the team. Take note of the phases of the sales process. Note the wins from LY from each sales professional. The hit rate and the GDP gives insight into the success of the sales professional compared to the market trends.

TEAM	Kim	Billy	Ken	Jose
Years of Service	6	4	25	3 months
LY Revenue Base	\$ 15,500,000	\$ 13,700,000	\$ 12,600,000	\$ 9,000,000
Prospect	120,000	80,000	160,000	75,000
Explore	75,000	60,000	45,000	25,000
Build Business Case	50,000	80,000	50,000	50,000
Articulate Value	75,000	45,000	30,000	40,000
Implement	140,000	100,000	80,000	55,000
Total	460,000	365,000	365,000	245,000
Hit Rate	30%	27%	22%	22%
Territory Growth	3.0%	2.7%	2.9%	2.7%
Geo GDP growth	1.3%	2.1%	0.8%	1.3%
Geo Location	Nashville	Huntsville	Birmingham	Memphis

Based on all the data – previous four years results, current sales pipeline, years of experience, hit rates, GDP data, and current economic outlook, what might the sales/business plan be for the next sales reporting period?

Growth should be the elementary thought. Growth is a given unless there is a real economic or supply chain issue. The management may consider that for **Nashville (Kim's area)**, we can say the following:

- GDP is the highest in the region with 1.3%.
- Territory growth on average for the previous four years is close to 3.0%.
- Kim has six years of experience.
- The results of the territory LY are the highest in the

region.

- The Pipeline is somewhat healthy and balanced.
- Hit Rate for Kim is the highest in the region. This speaks to her ability and possibly the quality of leads that she is receiving from the marketing team.

Based on the data, the manager can comfortably plan for a 3.25% increase in the new sales period if there are no other issues of impending serious economic recession or supply chain disruption.

**Memphis (Jose's area)** has a different story to tell. Some of the observations are as follows:

- GDP is trending negatively at -1.3%.
- Territory growth is increasing over the four-year measurement period.
- Jose is new in the territory (this is a red flag for planning – someone less than 18 months in the sales job).
- Sales results LY is lower than the rest of the team.
- The Pipeline compared to the other territories are lower.
- Hit Rate for Jose is low compared to the average. It is expected due to being new in the role.

Based on the data for Memphis, this territory may not be able to receive a planned increase as Nashville. The plan will most likely be somewhere around 2.5% as some of the sales results for the territory was the predecessor to Jose.

It is important to note that the sales plan should be using the data. Consider all the elements that may affect the performance of the territory. Give some grace to the employees within the 18-month training period. Be transparent with the process and the data. Transparency and open communication can prevent future disruption among the team due to perceived issues with the planning process.

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## 6.

# CHAPTER 6: SALES COACHING AND MANAGING (LEADING PROCESSES AND PEOPLE)

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### **Process [Lead, Select, Educate, Engage, and Support]**

#### **Lead**

As a conductor directs the symphony, the sales manager must conduct the efforts of the team. Each person on the sales team should be well-trained, in the right position, and fully understand the goals of the organization for the specific salesperson and the territory for which they are responsible.

When an employee has clear instructions regarding the sales position, there will be no ambiguity within the relationship. The sales manager must use concise, specific language. The manager must articulate each message with assertiveness (without aggressiveness).

Processes must be outlined with clear instructions for the employee on how the processes will be measured. There must

be an acknowledgement of the instructions with an understanding by the employee that the processes set forth by the organization will be followed.

There can be no confusion regarding the expectations of the individual or the team when it comes to management metrics, goals, and the desired results. The consequences for poor performance should be acknowledged as part of the agreement of employment. Lack of direction from the management cannot be a reason for performance problems.

The manager will enforce the direction of the organization. It is the responsibility of the manager to hold themselves and the team accountable to the processes and metrics of the leadership team. Enforcing the measurement with integrity across all employees equally is a critical behavior of the sales manager.

Routine appraisals of the team and individual's metrics will be reviewed as planned with results measurement. Each employee should receive objective behavior observation to determine impacts on the results of the work performance.

Uniformity of processes must be accountable to all. The manager is responsible for enforcing the proven work methods as outlined in the training by leadership and maintaining an openness for suggestions that will improve processes. Demand excellence. Be deliberate to ensure expectations are engrained into the daily walk. Set the course with the vision to accomplish the mission. Do not deviate from the message.

Warning: do all of this with love and empathy. Don't instill fear. Simply set expectations of the job.

Leadership considers the core business and direction of the organization. This is where direction for all teams is set and articulated clearly. At the highest leadership levels, we will find the following elements that will be used to guide the employees:

#### C-Level Leadership Responsibility

- Company Mission
- Vision
- Values and Culture
- Strategy

#### Departmental Sales Leadership Responsibility

- Sales Planning
- Metrics and Measurement
- Compensation Program
- Client Strategy and Planning
- Sales Behaviors and Reporting
- Goal Measurement

Re-enforcing the team with the power to perform will come through *strategic motivation*. Motivation propels forward progress. Some of the elements of Enforce are as follows:

#### C-Level Leadership Responsibility



- Visibility and Messaging
- Top Client Engagement
- Financial Support to the Sales Team

### Departmental Sales Leadership Responsibility

- Client Strategy
  - Market pricing and strategic client acquisition within the marketplace
  - Client relationship engagement opportunities
  - Case studies and partnership academic research
- Employee
  - Business Process and Strategy Management
  - Sales Skill Coaching
  - Recognition and Reward Structure
  - Performance Evaluation

### **Select**

Select is the single most important job of the manager. Recruitment is critical. It can be unforgiving. It is the difference between a poor team, good team, or a great team. The bottom line, your ability to select high-functioning employees with integrity and talent will determine your success within the market.

The formula for building a winning team includes a willingness by the manager to win. A winning manager does not take everyone and anyone on the team. The criteria for

hiring are based on ability and education, not on some other method. Leadership direction and results metrics based on the current market will lead the manager to hire the best person for the job that can beat the competition and generate revenue for the firm. Sales managers must ensure that they are following the guidelines of the Equal Employment Opportunity Committee (EEOC) guidelines that demand there is no discrimination in hiring practices. Considering these laws, it provides freedom for the manager to hire whoever has the best resume and abilities for growth.

Selecting includes building the job description, promoting the position, interviewing, hiring, and on-boarding the sales professional to your team. Placement of the selected employee to the right position and environment will ensure stability in the new hire. Matching abilities or interest to industry segments or client core products may prove to be an effective strategy for quicker time-to-proficiency of the sales professional. Improving the velocity of qualifying a sales professional on the team will provide benefits that extend beyond the happiness of the team member.

### **Educate**

Continuous learning and development of the team will ensure growth and increasing value for the sales professionals. Proper training includes but is not limited to self-realization activities, current events, improving negotiation skills, building business acumen, presentation ability, business strategy, and general marketing and sales processes.

Coaching skill is not innate. It is a discipline that is learned from education and experience. Great coaches stay close to strict fundamentals. Fundamentals are key to the sustained health of the team. The fundamentals guide the team through uniformity and alignment. Practice of these fundamentals leads to excellence during game time.

Prior to building a development plan for an employee, there must be an assessment of capabilities. Assessments must be objective with an ability to discern some level of performance in the future if given proper training. There are many people with potential. A successful coach chooses wisely the individuals that you will pour into. Careful not to cast your pearls before the swine. Meaning, don't waste your precious coaching time with individuals that may have natural talent but have low humility or work ethic.

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**Caution as fast-tracking leaders without strategic planning or management skills can create a fundamentally demoralizing situation for the employees and therefore causing unwanted turnover...**

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Movement of employees into various positions over their career is a tool for development. Pressing employees to get out of their comfort zone to take on additional responsibility will allow for planned growth of capability, knowledge, and wisdom. There is a need for caution as fast-tracking leaders without strategic planning or management skills can create a

fundamentally demoralizing situation for the employee and can create a morale issue with others on the team, especially if the fast tracker is put in some type of leadership position. Ensure there are proper mentors in place for would be leaders that are receiving consideration for advancement.

### **Engage**

To engage means that the manager personally gets immersed into the employee's career; without getting personal. Engage means that the manager will be available to the individual team members (all of them, all the time). Engage means getting close without breaking the important barrier of leadership responsibilities. For example, some experienced managers have the ability to go out for a couple of beers with the team. However, it takes a certain skill to be able to do this and maintain the respect level that the manager position requires. Respect can be lost when the manager loosens up too much during an after-hours event. Leadership must be able to keep the managing edge and yet be cordial enough to engage in a friendly evening that does not include talking shop.

Because engagement spans a broad range of leader-to-employee interaction, the text will expand on different categories of professional situations. Elements covered will include mentoring, open-door policies (employee concerns), employee growth programs (tuition assistance), employee assistance programs (substance or mental health), and accountability improvement plans (related to work performance).

Proper coaching is critical to the success of the sales manager. Many firms concentrate on a series of best practices that allow for encouraging engagement. We will concentrate on the following:

1. Don't Tell. Listen more than you talk. Ask open questions.
2. Conform coaching to skill levels – Each employee must have an individual plan.
3. Feedback must be based on behavior – Don't conflict individuality.
4. Fundamentals and Process – Never deviate from the message.
5. Coach forward – Inspire future success.
6. Emulate – Demonstrate the expected behaviors.
7. Demand excellence, in all things.

## **Support**

The troops you have are the ones that are fighting for the organization. Never disrespect your troops. Never assassinate the character of your troops. If the troops win, they did a great job. If the troops lost, the manager did a poor job leading them. The responsibility of support lies at the feet of the manager.

Support means leading from the front. The manager must be willing to demonstrate the expected performance at any time. The manager should never ask an employee to do

something that they themselves are not will do with the employee or have not previously done.

Training is a key element of support. The employee must receive training for the position. If there is a highly skilled employee new to the firm, the employee should receive adequate introductions to the people within the organization and the processes by which the team is measured. A manager that assumes will make mistakes.

Economic conditions will vary. Support for changing conditions will be required to direct the team with processes. For example, high inflationary pressures and rising interest rates may lead to recessionary conditions that uncontrollably negatively impact the sales team. The support from the manager will be required to ensure other business unit employees understand market conditions. Sales managers must work closely with marketing, finance, logistics, etc. to build cross-functional communication that leads to trust in managing the business overall.

Support comes through providing proper tools, time, and training that prepares sales professionals for the competitive marketplace. Some of the support elements are as follows:

#### C-Level Leadership Responsibility

- Publish internal reports with transparency of how departmental results affect the organization overall.
- Listen to the front-line sales professionals regarding market conditions.

- Be proactive vs. reactive.
- Provide funding for tools of the trade (CRM, computers, etc.).

### Departmental Sales Leadership Responsibility

- Sales planning time and role-play practice.
- Customer resource management system (CRM) for customer elements.
- Dashboards referencing sales metrics (reporting) (ex. Microsoft Power BI or Tableau).
- Marketing infographics, insight case studies, and feature documents.
- Eliminate challenges to the sales efforts.
  - Time for client pricing.
  - Assistance with proposals.
  - Supply chain studies.

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7.

## CHAPTER 7: DIVINE ADAPTATION - ETHICS

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### *Integrity*

Ethics are critical to the success of the sales professional and sales manager. Too often, business leaders shy away from attributes of God that can and should be displayed. Unfortunately, there is evil in the world. Temptation to make the sales numbers comes in many forms. Some of the temptations are as follows:

- Changing the calls per day to appear more work has been done.
- Embellishing stories of the sale to give impression the sales cycle is moving forward.
- Telling a client that certain things can be done when the team knows it cannot.
- Signing a contract page for a client that was missed during the implementation.
- Entering 45 minutes into the CRM for the customer visit when it was really 33 minutes.



- Fudging details during the sales planning period.
- Using incorrect information to make a sell.
- Imaginations can create endless diversions of truth.

There is also a real threat to seeing the negative side of sales and negotiators depending on the “length of business relationship.” The model displayed is a depiction of human nature when money is involved. If there is a very short business relationship (e.g. buying a car) when there are usually only two negotiables (money and the product), the probability of experiencing unethical behavior increases greatly. However, for long-term business partnerships where the benefits to the relationship are more mutually beneficial, there is a lower potential to have untruthful relationships.



There is a need for negotiators to withhold information from the other party. However, lying is not an option. Instead, simply inform the other party that you are not at liberty to disclose certain information. But, there is never a situation that a sales professional should lay down their integrity.

### **Communication Behaviors**

The social language is often an unforgotten art. The behaviors of individuals should be part of the overall assessment of the sales situation. The sales professional should know their own

type of preferred methods of communication. For the demonstration of behaviors, common styles are provided as follows:

## Alpha

- Abbreviated data, bullet points, and concise language. Just the facts, quickly. Leave the case study for backup.
- Quick text instead of an email. No lengthy phone conversations.
- Face-to-face business is good.
- Makes decisions quickly based on experience.

## Beta

- Wants accurate data. Methodical and calculated.
- Better with long email including details instead of text language.
- Lives with rules. Avoids risk. Prefers order.
- Want to be right without errors.

## Gamma

- Sees other possibilities in the data. Writes in long detail essay.
- Creative and likes to innovate. Appears aggressive sometimes.

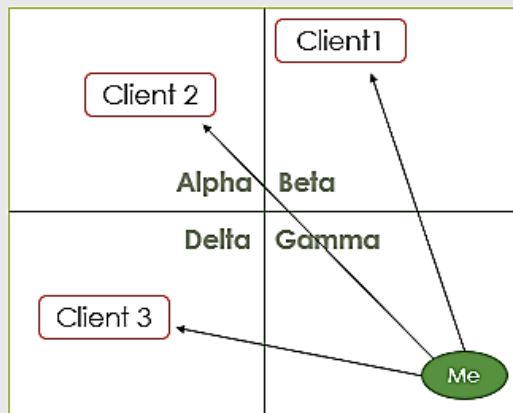
- Gut decisions. Talks a little too much.
- Rule breaker and tries to inspire others to go with them.

## Delta

- Is ok with long phone conversations.
- Enjoys in-person, peace and harmony, with a team and without conflict.
- Would rather someone else be in control.
- Takes on too much for the team.

The Alpha, Beta, Gamma, and Delta individuals are simply examples of different communication types. Consider how we may identify with anyone of them. Also, are there any that we contrast?

## Communication Behaviors



When interacting with clients or managing people, we must

understand that people are different and it is our responsibility to manage ourselves in a way that can bridge the communication gap with the other. Egos want the other individual to conform to our liking. Divine adaptation suggest that we find a way to build a bridge across personalities, academic, and cultural divides.

Know the audience when presenting to business leaders. A safe approach includes a high-level presentation with full back-up details available; include a case study similar to the situation.

**Chapter Overview** – YouTube channel



## **Chapter 1 Negotiation Role Play – BUYER**

**Caution – Only read the role play that you will be performing (don't look at other side).**

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### **BUYER Scenario Setup:**

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This negotiating scenario is non-specific to any industry. It is a basic negotiation that could be common to any sales situation.

You will be negotiating with a fellow student – one of you is playing the role of the Buyer and the other will be the Seller.

You will use your skill to negotiate the best deal possible.

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### **Rules for the Role-Play:**

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You will be given 20 minutes to read the scenario and prepare your negotiation strategy.

You will have 15 minutes to work toward a deal with your negotiating partner.

Begin when you are ready.

**Notes and Information:**

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You will need to determine your strategy for the negotiation. Write in your plan for the following on the scenario:

- Opening Price
- Target Price
- Walk-Away Price

You may write as much as you like on the paper.

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**Required Turn-in for Class:**

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**The Role Play is to be recorded.** Each person is to submit (independently) their own Open, Target, and Walk-Away that you initially planned. One person on the team should submit the video with full names of the participants.

**BUYER**

**Situation:**

Your grandfather gave you an Omega watch [1960 Omega Constellation with Pie Pan face]. He wore this watch during the Vietnam War. His Dad gave it to him prior to leaving for Vietnam. Your Grandfather told you that during those terrible



times of war, he would look at his watch and it would remind him of home.

The day that he gave the watch to you, he explained that he has fallen ill. He wanted you to have the watch so that each time you looked at it, during the tough times, you would remember him.

**Problem:**

Two months ago, you were working out with friends in the gym. The watch came off of your arm and fell to the ground; breaking the crystal glass and the “pie pan” face.

You took the watch to a reputable shop. The watchmaker explained that he may be able to find a crystal for a couple of hundred dollars. However, there are no “pie pan” faces available. He suggested you look for a “parts watch” in order to obtain a crystal and pie pan face.

You have seen an Omega Constellation on a popular auction web-site. It is in your town. The Seller agrees to meet with you. The watch appears to be poor shape and the case is not very good; but it runs. The crystal and face would be a good fit for your watch, if you can make a deal.

**Other Details:**

An Omega Constellation Pie Pan watch like your Grandfather gave you is worth about \$1,500. Depending on the shape, some go much higher. These watches are highly collectable. Grandfather is coming to visit in two weeks. You have tried to find other watches. The task has been very difficult.

You are resolved that this may be one of your only chances to get a watch like this. You must make a deal. It would break your Grandfather's heart to see the watch in a broken condition.

The watch you are looking to purchase is in rough shape. Fortunately, the crystal and pie pan dial are in good shape; equal to your Grandfather's watch. You have \$2200 in Savings.

**Instructions:**




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Your watch prior to breaking

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You are playing the role of the buyer. Your goal is to negotiate a deal for the watch. Remember to develop your Plan.

**Opening Price** \_\_\_\_\_

**Target Price** \_\_\_\_\_

**Walk-Away Price** \_\_\_\_\_



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The watch you are looking to purchase

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# APPENDIX - CHAPTER 1 NEGOTIATION ROLE PLAY - SELLER

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## **Chapter 1 Negotiation Role Play – SELLER**

**Caution – Only read the role play that you will be performing (don't look at other side).**

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### **SELLER Scenario Setup:**

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This negotiating scenario is non-specific to any industry. It is a basic negotiation that could be common to any sales situation.

You will be negotiating with a fellow student – one of you is playing the role of the Buyer and the other will be the Seller.

You will use your skill to negotiate the best deal possible.

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### **Rules for the Role-Play:**

---

You will be given 20 minutes to read the scenario and prepare your negotiation strategy.

You will have 15 minutes to work toward a deal with your negotiating partner.

Begin when you are ready.

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**Notes and Information:**

**Play:**

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You will need to determine your strategy for the negotiation. Write in your plan for the following on the scenario:

- Opening Price
- Target Price
- Walk-Away Price

You may write as much as you like on the paper.

---

**Required Turn-in for Class:**

**Play:**

---

**The Role Play is to be recorded.** Each person is to submit (independently) their own Open, Target, and Walk-Away that you initially planned. One person on the team should submit the video with full names of the participants.

**SELLER**

**Situation:**

You were at the annual Veterans affairs fund raiser garage sale four weeks ago. You bought a box of interesting items for \$25. In this box was an old watch. The watch has seen its better days. You looked the brand up on the internet and saw that Omega is a very expensive watch line. The 1960 Omega Constellation with “pie pan” face, when in good shape, currently goes for approximately \$1,500.00.

The Omega SeaMaster of the same year is going for \$4,000.00 or more.

**Problem:**

You took your watch to the local watchmaker. The watchmaker explained that the watch was not a great functioning watch, and the case was in pretty bad shape. The crystal and the “pie pan” face on the watch is in good shape.

You were hoping the watchmaker would buy the watch from you. However, he said that the watch was better as a “parts watch”. He really would not be able to sell it as a working Omega Constellation with a pie pan dial. The watchmaker offered you \$75.00 for the watch.

Because of what you read on the internet, you decided to hold out for a better deal, especially since some of the other Omega watches have really increased in value. You believe that the watch is still a good find for an enthusiastic Omega fan. These are rare watches. You placed an advertisement on a popular internet auction site. There has been no interest in

over two weeks. You finally got a contact. You have agreed to meet with this potential buyer.

**Other Details:**

The reason you went to this garage sale is that you serve on the board of United Way for Veterans. Occasionally you solicit Veterans and family members to speak at events to help promote the charity.

**Instructions:**

You are playing the role of the Seller. Remember to develop your plan.

**Opening Price** \_\_\_\_\_

**Target Price** \_\_\_\_\_

**Walk-Away Price** \_\_\_\_\_




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Your watch

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Like-new on the internet

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DEBRIEF THE LEARNING at YouTube channel