The Science Of
SELLING

A sales process and systems platform for improving sales and profits

Carpedia Consulting

Werner Hess

4 Relationship centered selling

The conversion process

The process steps within the complex meeting system can also simply be referred to as the 'conversion process'. For the sake of clarity and simplicity the complex meeting system can be broken down into a set of process steps, designed to get you and your customers where you wish to be. Having looked at the process steps of the complex meeting system in Chapter Three, in light of needs and value, we will now look at each step within this process individually and in greater detail.

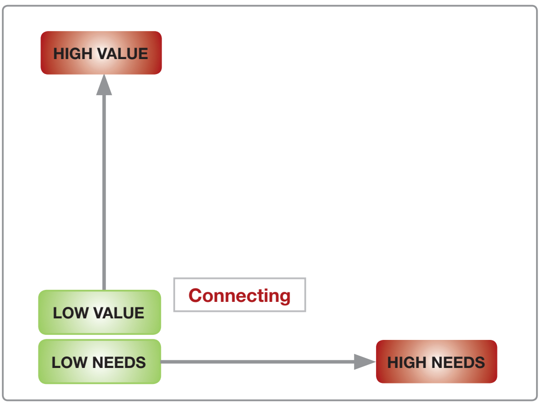
In the previous chapter, we considered the step of 'negotiation' in terms of the conversion process, for example. Volumes have been written about this subject, and people often perceive negotiation as the only important process within the conversion process. The relationship you have with your customers, however, should never be allowed to deteriorate into a negotiation. It is imperative to take a closer and critical look at this step – along with a closer look at the other steps – belonging to the conversion process, to adjust our view on these determining factors when it comes to landing potential customers and deals.

Relationship enhancing

The conversion process is a relationship-based process that steers potential customers in a direction where a conversation can be held that revolves around needs and value. There is not much place for tactics aimed at luring the potential customer into a predictable pattern of behaviour. If they sense they are being coaxed to reply or act in a certain, predictable way, they will probably feel that they are in a sense being trapped – by the situation, but particularly by your engineering of it. In other words, the process should not exploit customers' moods, nor apply pressure. This sort of thing may work temporarily, but, in the long run, will probably undermine the relationship – which would then deteriorate.

Customers can offer life-time values and recurring revenue streams, so one cannot afford *not* to apply strong business values and ethics during the conversion process – be frank, showing honesty, integrity, and sensitivity.

Connecting



It is said that people will make up their minds about you within the first few seconds of meeting you – perhaps as few as seven seconds. Assuming this is irrefutable, then it is indeed a challenging statistic to overcome. This is why one needs to be well-prepared for a meeting – for maximum impact, within a matter of seconds. So what, we might ask, is the best strategy for a positive first impression and a good start to the potential relationship? This chapter is an answer to this question, and is best read in the light of the conversion process framework discussed thus far.

First meetings can be referred to as the 'golden hour', because it is within this short space of introductory time that millions can possibly be made. Of course, those millions can only be made if one passes the value-judgments made by the person being met. For instance, the value-oriented judgments (or questions) that your 'million-dollar' clients might ask themselves – about you, and your company – include:

- Do they understand our requirements?
- How can they possibly add value?
- Does it sound as though the content of what they say, and the way in which they say it, suggests that they intimately know the industry/product/service?
- They might say the right things, but do we like them/their image?
- Or, do they look and sound like the other hundreds of sales people and marketers that have come through our doors?
- Are they going to be a waste of our time and money?
- Will we be able work with them, and, if not, why?
- Do they seem trustworthy?

Connecting – in terms of the complex meeting system – is the art and skill of being able to find common ground with someone quickly, and of being able to create a sense of trust, in light of the understanding that this person could become a long-term and faithful customer. Effective connecting begins with having a positive agenda and outlook. This sort of attitude contributes to the discussion productively, setting the tone for a relationship-enhancing meeting.

Dress for the occasion, no matter the day of the week – or the time of the meeting. Dark, somber colours, your best tie, shined shoes, and no random accessories (name tags, dangling memory sticks, iPod earphones) show your respect for them and your sincerity about the meeting. Then, take in only what's needed. Having anything more than a leather folder, for example, is overkill – i.e. first meetings have no place for your laptop and cell phone, because there shouldn't be any elaborate presentations or interruptions at this stage. Unless, perhaps, the potential client – with whom you're trying to connect – is an advertising or fashion mogul, there is also no need to sport the latest ultra-green Mohican haircut, or a three-day-old beard.

Mindset:

- Keep your mindset positive.
- Show genuine interest in conversation, as underhandedness will probably come across in the tone of your communication.
- Focus your concern first on the person, not on their company.
- Be receptive. You are there to find out about the possibility of a business-oriented relationship.
- Be open-minded, so caution yourself not to hold preconceived ideas about the customer's needs. You are there to uncover the facts.
- Being a little nervous is natural. This is natural. If you feel that you are overly nervous, then it might help if you imagine that you are simply having a chat with a friend – this is, after all, the goal of forming a relationship (to be able to talk honestly with a partner within a relationship).
- Imagine a positive outcome.

Body Language:

- Make and maintain strong eye contact.
- A smile makes you appear amiable and approachable.
- Deliver a firm, honest and convincing handshake.
- Be enthusiastic, without going overboard.
- Stand up straight and, when seated, sit up straight.
- Keep your feet firmly planted – be confident.
- Careful not to slouch.
- If you are wearing a coat, don't make a fuss by removing it.
- Relax – consciously tell yourself to relax muscular tension. Don't be surprised if a more relaxed mode helps you pay greater attention to the *real* issues outlined by your potential client, rather than the inconsequential matters that inevitably rise in conversation.
- If you are relaxed, it will also help you not to fidget, keeping your hands still and in the open.
- Don't open a folder to jot things down – this suggests your attention is divided. Best to keep your folder closed, by your side.

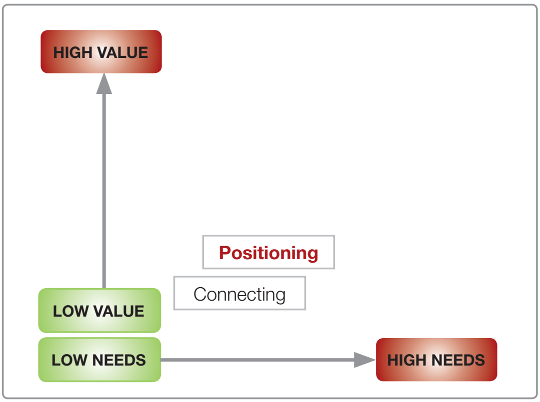
Language:

- Take note of whether your potential customer is following the rate and tone of your voice. Modulate your voice to a paced, well-pitched and comprehensible style of delivery.
- Smiling when you talk actually makes you sound better – and friendlier.
- You want to be understood; short sentences are easier to follow than lengthy ones.
- Say the minimum to get your point across – the most important thing, at first, is that your key message is understood.
- Concentrate on your conversation. Don't do things that distract from what you are saying, like synchronizing your watch, for example, which says to your listener: "Let's check how much time

you have available". This is an amateurish portrayal – it shows that you are a newcomer to the world of sales.

- Don't fool yourself about the appeal of small talk. Small talk doesn't sell. Many people try, incorrectly, to find common ground in conversation with their listener by focusing on some of the paraphernalia in the office, for example.
- An easy, short introduction will serve you best when connecting: "*I am Jack Black from CC Cable Enterprises. Thank you for seeing me. The purpose of meeting with you is to talk about how we work with clients in the cable market.*" Nothing more for starters. Just that. This kind of talk also enables you to make a seamless transition – going from connecting to positioning.

Positioning



Positioning is the art of telling people what you and your company do and how that may be of value to them.

You may want to use this opportunity to incorporate your company's value proposition into your positioning statement. This incorporation is effective as an initial sales-language approach, because collateral language-oriented material (i.e. standardized company documentation) should itself incorporate company's values and goals. This means that the first words your customer hears will be echoed not only in your subsequent communication repertoire, but also in your company's language. This consistent message makes for a very powerful impression, reducing potential dissonance, and thus ringing 'true' in the ears of your customers.

What should your positioning statement include?

First of all, talk about yourself. Initially customers are interested in learning more about you than your company. There is a reason for this: companies have images, and thus they attract and hunt for people that match their corporate profile. This means that knowing more about you, is in a way a kind of inside scoop on the company itself.

Provide a brief description about yourself, covering your background and your career, and about your current position. For example:

"*I look after customer acquisition at CC Cable Enterprises. Before joining CC, I spent a number years with Arial Cable in product development and prior to that I was the researcher at Volt Cable Co. I joined Volt straight after graduating in Cable Engineering from Ultra University.*"

Then, when introducing your company in brief, consider communicating something similar to the lines below:

"*CC is a specialist engineering firm, and we design and develop customized engineering solutions that help our customers improve productivity and reduce operating costs. We normally conduct a detailed analysis of your production environment before coming forward with a detailed proposal to implement custom tailored engineering advances to help you deliver significant and sustainable productivity gains. We have* *been in business for twenty-two years now, employ a hundred and fifty people, and operate nationally out of our head office in London.*"

You now need to introduce your value. This is where the value proposition comes in. You need to describe the value and say what makes you and your offer different.

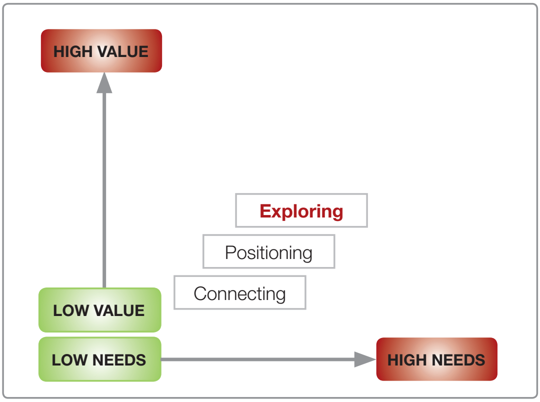
"*Our key focus is productivity enhancement and we build specialized machines and adaptations to get your equipment to perform better. Our long-standing experience in the industry, in building customized solutions, positions us well to tackle any challenge in all areas of cable manufacturing. Companies like Universal, Voltage Master and Ampere count amongst our customers and we have concluded more than a thousand specialist projects in the industry in the past five years. We normally achieve productivity enhancements of between twenty and thirty percent with our unique approach and in-depth experience in this business.*"

Good positioning revolves around:

- Conveying your personal credibility by giving a brief description of your career and experience regarding the field in which you are active.
- Avoid too much detail. The customer won't be interested in every management course attended and every project that you have participated in.
- Giving a concise and meaningful introduction about your company.
- Providing a concise and meaningful value proposition of how your company delivers value to customers.

Turning the conversation towards your customer should now be possible, starting the process of exploring.

Exploring



The conversation should now become both serious and interesting, because you are about to start talking to the customer about their business – their concerns. 'Exploring', almost by way of definition, connotes 'finding out something'. And if there is something to 'find out', it follows that there was something at first not known – a question perhaps, which was then followed by an answer. Conversational (non-interrogative) questions are fundamental to the 'exploring' step.

Exploration can at times unfortunately be perceived of as intrusive and aggressive. Do not be surprised, nor show your surprise, should a customer say – or act in a way that says – "*what's that got to do with you!?*" Effective exploring needs to be conducted with confidence so as to appear very matter-of-fact, making it non-intrusive. The skills of effective exploring can be summarized as follows:

- The use of exploratory questions to understand the general situation.
- The use of confirmational questions to confirm problem areas.
- The use of high-gain questions to create needs from problems uncovered.

Exploring should, as said above, at first be very conversational so as not to appear like an interrogator. For instance:

"*Is it possible to describe your production infrastructure to me in broad detail?*" Rather than a bossy, "*what is your infrastructure all about?*" And, "*well, what could you tell me about your quality requirements?*" Rather than, "*tell me your quality requirements!*"

Other examples of conversational questions include:

"*Do you currently feel inhibited by your productivity initiatives?*" "*How do you normally initialize a cost-reduction programme?*" And, "*are machines and production equipment a constraint?*" These kinds of questions rather than their course, overly-direct alternatives that make you appear gratuitously forceful.

If you find that customers are squirming from all your pointed questioning, you may want to step back a bit and relate a story that has to do with your own experience within a specific area in question. This technique of turning the heat down – *interjecting* – allows the conversation to flow. For instance, notice the self-reflection in the following lines:

"*Now that you mention die valve blockages, we find that a cooling ring built into the die valve reduces the amount of die cleaning operations significantly. I'd like to make a note of that and share some of our experience with you.*"

The exploring session should also cover most matters relating to the business at hand, so the conversation needs a leader: change topics, move forward, asking questions about other areas of their business.

"*Yes, I am sure that we can spend a lot more time talking about reel breakdown, as it is a common problem. I want for a moment, though, to focus on the splicing process. What would you say are your key challenges in splicing?*"

Once you have confirmed problem areas (through confirmational questioning), your questions should illicit as much information as possible – i.e. ask high-gain questions. For example:

"*If you could list all the machine constraints currently being productivity barriers, would that help you in an evaluation of the potential changes that could streamline your output?*"

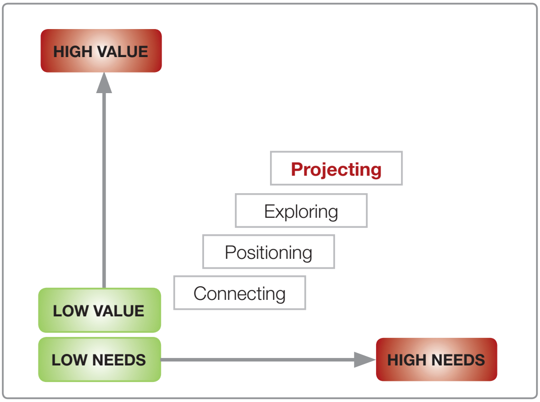
Effective exploring points:

- Avoid coming across as an interviewer or interrogator.
- Start with the general, working your way to the specific.
- Use conversational questions to explore the general situation.
- Use confirmational questions to confirm problems.
- Use high-gain questions to highlight needs.
- Use interjection as a way of interacting during the process, sharing ideas and experience.

Effective exploring not only helps you to understand the problems and uncover customers' needs, but it also allows you to further build upon the image you project, in terms of value, to the customer – adding to the relationship. A conversation isn't a one-way street – it is an exchange of information which benefits both parties.

Notice that once a customer has revealed their need, when they confirm that they have a problem, they tend to confirm, concomitantly, that something should be done about it. When this happens, a transition will take place in the conversation – you now naturally head towards the projecting process, because *you* are the person to have opened *their* minds' eyes to problems, as well as to the solutions.

Projecting



Customers tend to have difficulty in seeing the full potential of what can be done for them, in their business environment. This may be as a result of limited experience, a knowledge gap, and sometimes even a dogma, work ethic or belief that limits them from thinking outside of their box. This is indeed the challenge: to help them see what a specific solution can do for them.

At this point in the conversation – when showing how you can solve their problems – there should be signs of a relationship being forged – moving in a positive direction. The customer has revealed, for instance, that there is a need to take action in a specific area and you have ascertained that this is a great opportunity, worth putting more time and effort into.

It's now time to talk about the approach in solving this problem of theirs: how and what you and your company can do to help the customer solve their problems so that both of you can benefit economically. A good start to the process of projecting is to restate the need:

"*Well, we have established that finding a solution to output enhancement will certainly gain the organization some additional sales.*

If we could improve output by 15%, there will be a significant business case for making that happen. Let's talk about how we can approach this challenge."

The customer should then understand a bit of what you have done for other companies and how you would go about tackling similar complex issues within the context of their particular environment:

- Using relevant analogies, based on previous experience, is an effective way of projecting the value of your delivery. It may sound something like this:

  "*At Voltage, we took a very conservative approach. We first reviewed the total plant and all the production processes and highlighted areas of potential improvement. Then we went into design mode and worked on a few potential solutions which we costed out and presented to them for detailed consideration. Finally, we negotiated the best possible solution going forward, taking all factors into consideration. After this phase, they engaged us to do the work.*"

- Assuming some form of calculation, and by referring to very basic concepts, you can make a very strong case for proceeding with the discussion. For example:

  "*If your current production sells at $40 per meter, and your output is 10,000 meters per day, then every 10% of gain in output will be worth $40,000 per day. That is roughly $14 million per annum. Certainly worth pursuing!*"

Projecting is also the process step where you can really get customers excited, building on their enthusiasm, and directing them towards change. If you can get them to see their need – and through effective projecting get them also to see the value on offer – then you are in a great position to make the most out of this relationship.

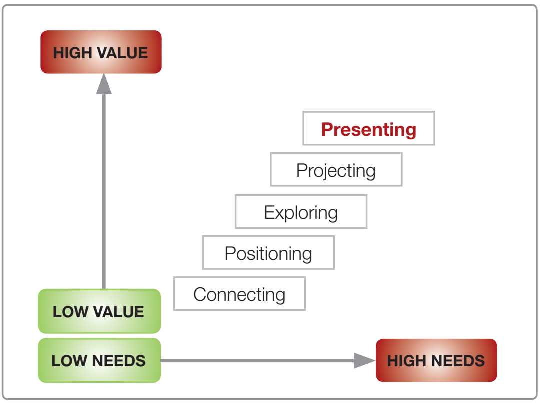
This meeting would end with a request for you to:

- Present your credentials and a proposal to the key role players in the company. This would sound similar to the lines below, for instance:

  "*As a next step, we could prepare a presentation for the key role players and include in that presentation our credentials, the opportunity statement, and a proposal covering a few optional approaches that you could look at with a view to finding solutions.*"

Once you have reached an agreement along the lines as outlined above, then dates can be mutually decided upon for the presentation.

Presenting



Your customer would have agreed to key role players being involved and would have given you the green light to touch base with key personnel in order to pave the way for the success of your presentation.

It's never a good idea to walk into a room full of people that you have never met, so do some preparation and set up a series of meetings pre-presentation day. Spend ten to fifteen minutes with each role player, summarizing what had taken place thus far and outlining what they can expect at the presentation. Your discussion with such key people would do well to include the following points:

- Why the first meeting was held – the main, or primary, reasons for it.
- What was covered in that meeting.
- What was agreed upon during the discussion.
- What the follow-up presentation would cover.
- What special requirements were raised.

Once date and time for the presentation have been agreed upon, make sure that you have a list of all the participants – avoid surprises.

With date and time set, consider three P's: prepare, practice and present. Failing to prepare, prepares one for failure. When preparing your presentation, set a clear objective to it. Keep your slides focused, clearly-spacing components, and clean of clutter and rambling texts, so as not to lose your audience in presentation – as overly-detailed presentations often implode, because they frustrate clients who wish to focus on the specific goals for their company. On running through your presentation, when practising, make sure that the tone, pitch and rhythm of your voice, your actions (movements or facial expressions) and the signals that you let off (dress code, for e.g.) match the quality and content of the proposal. In presenting, take the lead and take control (kindly) of the situation. What you do or say should break the ice, warm the atmosphere, and make yourself appear amiable – which is thus also seen as approachable.

If you have prepared and practised thoroughly, you would have considered the presentation through the eyes of your respondents, and would have posed questions to yourself – as seen through their eyes – as well as answered these questions. There is little more satisfying to a respondent than to see a smile spread across a presenter's face – a smile that says, "*I saw that question coming, but have I got an answer and a solution for you!*"

Your presentation – or your company's standardized presentation – should have a basic structure, covering at least the following:

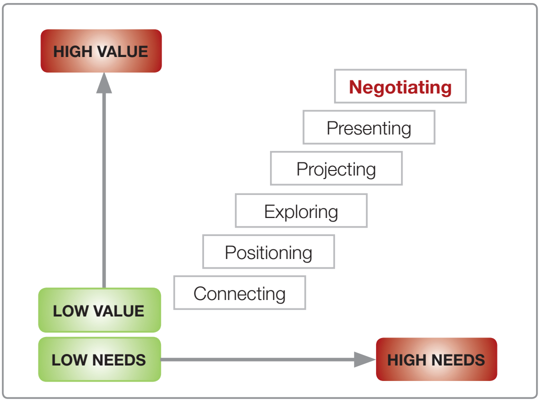
- Who we are.
- Where we have come from – as a company.
- Where we aim to go.
- What we do.
- Why we are different.
- How we work with clients.
- A concise, recent and relevant case study.
- Our understanding of your challenges.
- Our proposed solution.
- The mutual way forward.

In today's world most organizations use pre-populated and pre-scripted information and presentation formats – referred to as 'collateral'. If your company doesn't have a collateral library, then adopting an open-source framework for one's presentation, from comparable industries, might suffice. However, businesses tend to each have their own corporate identity – and collateral documentary libraries tend to convey the individuality of these identities through differences of literary and communication style. The best approach to presentation format, in other words, is to develop one's own collateral (before presentations are even a necessity). This means getting an advertising company or professional copywriter or editor to write, structure or restructure one's professional documents in the light of the fact that such textual material will be required, repeatedly, in view of the complex meeting system – a system that routinely involves presentations of the highest quality.

Generally, presentations should be standardized – as this saves time and money. And, if one's company's products, services and goals do not change regularly (as they probably shouldn't), then there is, likewise, not much need to redo, reformat, or rewrite e-presentations. Of course there may be different contexts in which a presentation has to be given; selling – the same services or products – to different clientele bases, for example. Essentially, cutting and pasting from the collateral library, and merely adjusting the standard presentation's style of communication for a particular context, is all that one has to do to customize the content. For example, a collateral library might have well-written documents as to: who you and your company are, what it is that you do, where you've come from and where you are going (in other words, your history and your future goals), why you think your company is different, and, perhaps, a couple, relevant and concise past case-samples as examples of how you conduct business and what you have previously achieved. What changes, then, in the presentation, is just the particular information, concerning: why this particular meeting, what current mutual goals can be met, and what the specific statistics promise with regard to this potential partnership and, especially, how those exact statistics will be achieved.

Remember: ensure that the presentation includes budgetary cost structures. And, finally, make sure that you have called for a final meeting – where details can be discussed about what needs to be done, before you leave the current presentation meeting. Once this final, follow-up meeting to your presentation has been set up, you can then start preparing for the negotiation process.

Negotiating



'Negotiation' is a 'big', five-syllable word that conjures up the idea of people sitting together in arm-wrestling mode, with one trying to gain advantage over the other. It is seen as a confrontational process, suggesting that there will be a winner and a looser.

The negotiating process is in fact a very necessary step in the process. It is, in a sense, a kind of mechanism that confirms the economic feasibility of the work that needs to be undertaken. It also takes potential issues and obstacles into account. Further, negotiation is in a way a comfort for interested role players, who want to know how exactly the process will meet the expectations of both parties.

There will certainly be a focus on costs – which needs to be expected, appreciated and respected. In such situations and circumstances, professionals seldom take anything at face value. Costs are however not the only areas of negotiation: you need to be sure that delivery time, quality, conformance, guarantees, and payment terms are all carefully agreed upon.

Negotiation, or this 'agree[ing] upon' phase, should be seen simply as a step in the sales process, where you and the customer both have to make sure that the deal suits both parties. A mistake sometimes made by sales people is when they regard negotiation as a make-or-break phase of the deal. Rather, think of negotiation as the phase where needs are high and customers' perceptions of value are also high. Negotiation at this stage, then, is all about the commercial detail of the deal – not whether the deal will be done or not. At the risk of sounding repetitive, if you are in negotiations, the deal is in a sense already done. Make the best of this phase in sales, by focusing on what customers are asking of you, and how you can further both of your businesses by appropriately fulfilling and solving their needs and problems.

Objections

Caution yourself not to read questions posed as though they are objections to your proposal. The customer may simply have concerns that need to be resolved. If you effectively resolve their concerns and issues, you are in effect removing barriers and obstacles – and this is your green light to a go ahead.

The Negotiation Grid

The negotiation grid helps you to reach the right frame of mind and to create the desired atmosphere for negotiations:

Negotiation Grid				
	Adversarial	Positional	Collaborative	Relationship
Player	Enemy	Opponent	Party	Partner
Strategy	Attack	My case	Their case	Our case
Tactics	Tricks	Concessions	Trading ideas	Sharing ideas
Outcome	Lose-lose	Win-lose	Win-win	Win

Obviously, in a negotiation we want to be in a position where we partner with customers who can strategize with us, mutually, and further both our businesses. Sharing ideas and creatively reaching an agreement can result in a winning, long-term and positive outcome.

The opposite scale to the negotiation grid could be conceived of in terms where the customer is a kind of enemy: we strategize plans of attack, applying tricks (often dirty tricks) to reach a forced outcome – but which will probably only suffice for a short-term relationship, until the customer becomes wise to such tactics.

Figure 12

The negotiation continuum is a framework to guide your negotiation plan when in motion. You need to start off with an open discussion of what the value is that is being identified. When the value can be validated, the customer still needs to understand that, in choosing you as a partner, they would have chosen you above all the options available in the marketplace. This suggests that your competitors are poor at doing what you do. You need to manage the process carefully, however. Maintain your integrity, having reached high ground. The key differentiator in the process should always and clearly appear to be you – and, also, your particular way of managing the process.

The following steps, as seen in the diagram above, provide a structure which helps to drive one's negotiations towards desired outcomes:

Open discussions

Revealing the agenda opens up the discussion. State the purpose of the meeting and the major items that are to be discussed. Developing an agenda around the areas of common ground and shared goals makes for a transparent and fair exchange.

Explore motivators

Without minimizing threats and without disputing facts, test relevant issues, the validity of assumptions, as well as questions and solutions.

Create value options

Keep options tentative, whilst still incorporating customers' ideas. Link motivators to options, trading ideas to get both you and your customers' motivators met. Finding correlations between customers' options and your own puts your negotiation on track for agreements to be reached.

Build on agreements

Check whether a mutual understanding has truly been reached by summarizing issues agreed upon. Itemize steps to be taken, and set time frames to be taken into account.

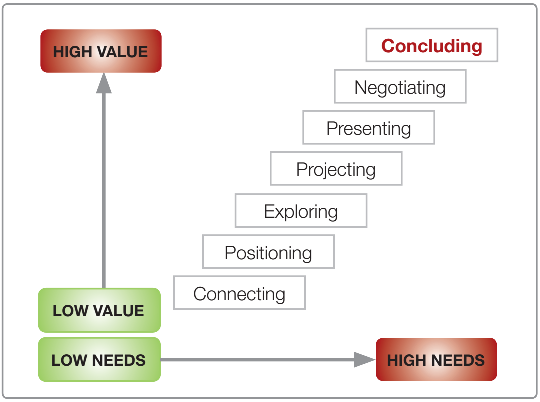
If agreement seems simply too difficult to reach, and customers' expectations are impossibly high, consider negotiating a 'trade-off'.

Trade off

Today, not many solutions fit in perfectly with customers' problems or requirements. In the majority of cases where a few options are being considered, it is probably best (and perhaps even necessary) to discuss trade-offs. Trade-offs are normally made on the basis of functionality (what suits the customer) versus the cost and expected efficiency of the solution that can be provided. Whilst not all solutions can be thought of as the best options (at a given cost), it may be necessary to go with some solutions of this kind over others – mostly, because of finances. Creativity, in helping customers make the most suitable economic or technological trade-off, is sometimes required in the negotiation phase.

Once you have successfully completed the negotiation cycle and you have ensured that the customer is satisfied with the solution presented, the process moves naturally to the conclusion phase.

Concluding



Much is written and spoken about strong closings, strong closers, the talent for being able to close deals, and about the people to whom this talent belongs. This might leave one with the impression that customers don't know what they want, and that a major victory is won by landing a deal by being pushy and persuasive. In some situations this may be true. But, it is debatable, in this day and age, whether such pushy tactics are effective. Today, there is an enormous amount of information that attempts to 'sell' stuff, which might leave many people unreceptive to the sale – all this info, in other words, is in a way an insult to people's ability to decide for themselves what it is that they want, and when they need it.

Think of the concept of the 'trial close'. This kind of closing assumes that customers make decisions based on impulse rather than on logical deliberation. It can be conceded that emotions do play a role in decision making. However, today's customer is hardly susceptible to being 'closed' before they have made up their minds about what it is in fact they want. It may be very poor logic from a sales point of view to assume that you can influence the customer into making a decision when they are not yet actually ready to make one of any kind.

Perhaps this scenario relates to a retail low-ticket-price decision, but it is surely out of place in the complex world of relationship-based conversion. In relationship-focused worlds, the 'closing' is normally done by the customer – it is their decision.

If you have managed the whole conversion process well and you have worked with the customer throughout the process, it is very likely that the customer will be doing the closing. It may sound something like this:

"*Well Joe, I think we have sufficiently covered all the issues and I believe that we should go ahead with your proposal. Can we settle the paper work in the next few days and confirm delivery for next week?*"

When the customer assures us in this way of the go-ahead, you can be sure that your conclusion has been reached. This stage of the conversion process, then, is conclusive – or what we can refer to as 'concluding'. It is when we, together with the customer, reach the conclusion that the deal needs to be put into action. Be mindful of and on the look out for potential deal-breakers, though, which could unfortunately come in from nowhere. Act fast if necessary: plan to start delivery as soon as possible, after the conclusion, so as to create of the deal 'work in progress.'

The following unexpected events which break the deal could include:

- A key decision maker/influencer that comes to the fore, having been left out of the initial loop. Ensure that all key decision-makers are involved from the very start.
- Unexpected turn of events – like acquisitions and disposals.
- Some or other paper work breaks the deal. Ensure that you have met all compliance issues, such as paper work and contractual obligations.
- Hard closing raises red flags. A sales person who is 'always closing' will raise red flags, and will possibly irritate customers, to the extent that the sale can be lost because of their heavy-handed closing tactics. Ensure a logical and focused approach is followed to bring the sale to a conclusion.

If you have brought another customer on board, having followed all these steps, then congratulations are in order. The significance of this particular closed deal is that you have taken responsibility for – and have set the tone for – the relationship and its future. The revenues emanating from this transaction are current revenues. Through promised delivery, good service and other relationship-cementing activities, this may be the first of a stream of revenues that your company can benefit from, from this client.

Often, some time will elapse between the final decisions reached regarding needs and problems, and the actual implementations of the proposed solution. During this time, keep in contact with your new clients and keep your responsiveness, to whatever queries still follow, high. Work out and project-plan the implementation of the solutions, visiting your customers to confirm details – possibly even introducing other team members to reinforce customers' decisions to go ahead, on the one hand, and to alleviate their doubts – if they should have any – on the other.

The complex meeting system and the conversion process are key tools that you can use as a framework to help navigate you through the complex and challenging process of conversion. The process is non-manipulative and will stand you in good stead as being different, and having a unique value-delivery potential.

The conversion process may appear to be sequential, starting off with connecting, and then following through with positioning, exploring, projecting, presenting, negotiating and finally concluding. In practice, you may only get through to projecting in the first meeting. This means that you will have to conduct a condensed version of the first meeting at the following meeting – in order to create a sense of continuity and linkage. What could also happen is that you may move between exploring and projecting, backward and forward a few times, before the situation allows you to continue. The conversion process, in other words, serves as a frame of reference and allows you to seamlessly conclude the process in one meeting, or over a few meetings. These are simply guidelines, so you can safely, to some extent, deviate from the framework if needed.

The benefit of working with a framework, in other words, is that if someone had to put the question to you as to how well your meeting went with a prospective customer, you could respond specifically rather than generally. For example:

"*We did get to exploring, and the customer did reveal some of the problems that they were having. Due to a time constraint, which came up unexpectedly, we are due to meet again next week. We'll start where we left off, exploring the problems and then hopefully move towards projecting.*"

Emphasis

A critical 'untruth' about customer conversion lies in thinking that if you are good at this in one market sector, you can then achieve success in any market sector. This view appears to have been promoted by theorists in sales methodologies. Sales training courses often refer to sales situations in a specific industry – for example, office equipment. Of course, the fact is that the methodology might have been developed within the office-equipment sector and it indeed works well in that environment. This is perhaps why the originators of standard methodologies seem always to refer to the universal applicability of their particular methodologies or training packages. Reality is, on the other hand, that the same methodologies may just not cut it in the market place, when dealing with high net-worth individuals and complex investment instruments. Although the conversion steps can be applied within whichever sector, different market sectors, like different customers segments, need – on some level – different approaches with respect to the conversion process.

One's way of talking should differ, for example, according to the differing market sectors. Consider the cell phone industry. The content of sales talk has to be appropriate to this phone-oriented industry, so that conversations held within this market sector are spoken in the language of this sector – talk the talk, in other words. This is essential as the environment in which the conversion process has to be delivered, say, for long-term corporate contract accounts, is very different to providing retailers with pre-paid airtime packages.

Similarly, with regard to fast moving consumer goods, we have developed several conversion processes and have introduced several training programs to address which skills are suitable. Key account directors are obviously different to reps – whose work doesn't require directorship skills, but skills needed to work in the field, where their goal is to get new customers and larger orders from existing customers. The process for converting prospective new retail outlets is also different to the process of introducing a new product. This may seem like an elaborate approach. Developing training programmes for different sales situations could be seen as a luxury, which very few companies can afford.

However, at the core, what would remain the same through all kinds of sales situations in all kinds of industries is the macro structure of the conversion process – as outlined previously.

We have had a look at these steps within the conversion process in previous chapters, as well as had a closer look at these steps in detail, in the previous chapter. Below: consideration of the style of language, exemplifying the varied use of language within the conversion process – in particular, in relation to a retail and a professional service-oriented environment, respectively.

Conversion process: retail language

Connecting: "*Good morning sir, how may I help you?*"

Positioning: "*I'm Joe, and I look after customers in the shoe department. Please feel free to browse and call on me should you need assistance.*"

Exploring: "*What kind of shoe are you looking for? Work, Leisure, Sport?*"

Projecting: "*This particular pair may be what you are looking for. It's a high-quality design, currently very fashionable without being outrageous. It's very suitable for your needs.*"

Presenting: "*Now that you are wearing the shoe, I think you will appreciate the comfort of the fit. Its basic quality seems to underline your style.*"

Negotiating: "*This shoe might be expensive, but it will certainly last you a few years and that's the real value of buying quality! The alternative would be to look at the other shoe, but, putting myself in your shoes, I wouldn't compromise on quality.*"

Concluding: "*You are making the right decision here. The shoe may cost a little more than you wanted to spend. But, you are buying quality. Well done!*"

In retail, you may place more emphasis on projecting and presenting, spending more time developing a rapport with the customer during this phase of conversion. However, you cannot afford to neglect the other process steps.

Conversion process: professional-service language

In a professional services firm – for example, a legal practice – the process remains the same, but emphasis and content changes according to the situation. Legal firms also need to send partners out into the market to acquire new clients and to deepen the relationship with existing clients – which they would do, particularly, when new areas of expertise have been developed. For example:

Connecting: "*Good morning. I am Jean Smart of Smale and Smale. It's a pleasure to meet with you. I am new to the Smale and Smale partnership, having just joined them to cover the area of complex litigation. I have spent ten years with the Kennedy organization, specializing in complex litigation and have joined Smale and Smale to help them build up their expertise in complex litigation – with the promise of a partnership, in due course.*"

Positioning: "*Complex litigation really refers to instances where you would get into very serious legal issues with parties and where many millions of dollars are at stake. These instances may vary from something as general as a distributor suing you for non-performance to a major claim arising from a city – where you may inadvertently have caused serious and irreversible environmental damage and face a serious penalty. Complex litigation is a serious and involved area of the law and requires experience and specialization to protect clients effectively.*"

Exploring: "*Do you currently have a specialist legal partner that you would consult with about complex litigation? How do you feel about using Smale and Smale for these instances? Who would be the responsible person in your company to deal with Smale and Smale on this issue?*

Do you have processes built into your existing legal policies framework, which would protect you at source against a complex legal suit? Have your current contracts been reviewed in the light of complex litigation?"

Projecting: "*A valuable and ongoing service that we could offer right now is that of a review of your current legal framework, as well as to 'future proof' some of the contractual relationships that you may get involved with later on.*

Our process is refined and it would be completed in three weeks. This process would involve us creating a framework of reference so that any legal issues from now onwards would be subject to a framework review before actual legal commitment takes place. It's a unique approach which is cost effective in the light of potential risk – and peace of mind."

Presenting: "*Our review would be carried out in three phases. In the first phase, we review all contract content specifically from a complex litigation perspective. In the second phase, we would make actual changes to the contracts protecting you, even further, and make exclusions where we see a potential for risk. Your contracts would then be updated and we would inform you of key caveats that would refer to complex litigation protection. The third phase is considered the conclusion of the review, with the submission of a best-practice framework. This is for your future reference, and for the start of an ongoing relationship on an engagement basis.*"

Negotiating: "*I appreciate it that you may not see the need for this kind of protection right now, but a complex litigation incident could hit your company tomorrow and being prepared and proactive and managing this* *particular risk is what you need to do as a matter of good management practice.*"

Concluding: "*You are making the right decision. Being proactive and prepared for the eventuality of complex litigation now leaves you and your company well-protected.*"

The legal environment is fraught with difficulties because of the letter of the law and the emphasis of your conversion process steps would be weighted more to projecting and negotiating than to the other steps. Presenting will be specifically challenging in terms of summarizing the solutions and benefits – in layman's terms, without losing legal relevance.

Having looked at the conversion process from two entirely different areas of customer conversion, it is clear that, while content and emphasis varied, the process remained the same.

Sales conversion methodology can, as said previously, be applied by sales people within all industries, because it is an adaptable process. There are, of course, differing elements – language and style of communication being two such elements – within different industries, which sales people need to consider if they are to successfully incorporate the customer conversion process into their sales set of skills.

SUMMARIZING THE CONVERSION PROCESS

- **The conversion process** is key to navigating the sale successfully.
- **The conversion process** leads the customer toward taking the right actions to satisfy the identified need**.**
- **The conversion process** is relationship-enhancing, because of the process steps.

KEY STEPS SUMMARIZED

- **Connecting ...** To find common ground and establish credibility.
- **Positioning ...** Yourself, your company and the value that you provide through your value propositioning statement.
- **Exploring ...** The customer's environment, challenges, problems and needs.
- **Projecting ...** The value of your specific solution in the customer's environment.
- **Presenting ...** Emphasizing options and practical activation paths.
- **Negotiating ...** Negotiating the best possible solution that would best fit the customer's environment.
- **Concluding ...** The customer will conclude with a go-ahead, provided that you have negotiated all the process steps successfully.