



Consultative Selling QQI Level 6 6N2054 Course Manual

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Introduction

Welcome to the Consultative Selling course from DCM Learning.

This course manual is designed to help you to take notes as you work through the interactive modules, exercises and videos that make up this course. This can then be used to assist you in preparing your assessments, as well as being a practical 'aide memoire' for you in your role in sales.

You will also see that a number of activities are built into the text in this document. These activities are designed to reinforce your learning and they do not have to be submitted.

At the end of this course, you will gain the knowledge, skill and competence to successfully apply consultative sales methods.

Within this manual you will find your detailed course topics along with additional information to further expand your knowledge and understanding.

NOTE: This manual is for your own use and does not need to be submitted to your tutor.

Introduction to Quality and Qualifications Ireland (QQI)

QQI – Quality and Qualifications Ireland is an independent State agency responsible for promoting quality and accountability in education and training services in Ireland. It was established in 2012.

QQI's mission is to:

- promote the enhancement of quality in Ireland's further and higher education and training, and quality assure providers;
- support and promote a qualifications system that benefits learners and other stakeholders.

QQI's role as directly stated is to:

- promote, maintain and develop the Irish National Framework of Qualifications (NFQ), a 10-level framework for the development, recognition and awarding of qualifications in Ireland;
- approve programmes offered at a variety of schools, colleges and further and higher education and training institutions. These programmes lead to qualifications (QQI awards) listed in the NFQ, which are recognised internationally;
- regulate and promote the quality of programmes offered by schools and colleges leading to qualifications in the NFQ for the benefit of learners, employers and other interested parties;
- ensure that providers* offering national qualifications provide a positive, high-quality experience to international learners coming to study in Ireland. We will do this by authorising the International Education Mark (IEM);
- provide academic advice on the recognition of foreign qualifications in Ireland through a service called NARIC Ireland – the National Academic Recognition Information Centre. We also provide advice on the recognition of Irish qualifications abroad;
- inform the public about quality assured education and training programmes and qualifications through a database of programmes and a register of providers;
- advise the Minister for Education and Skills about national policy on quality assurance and improvement in education and training;
- manage a national scheme for the quality assurance of English language services (Accreditation and Coordination of English Language Services – ACE)

The National Framework of Qualifications (NFQ)



Qualifications frameworks describe the qualifications of an education and training system and how they interlink. National qualifications frameworks describe what learners should know, understand and be able to do on the basis of a given qualification. These frameworks also show how learners can move from one qualification, or qualification level, to another within a system. Over 150 countries are now developing, or have developed, a national qualifications framework.

The Irish NFQ, established in 2003, is a framework through which all learning achievements may be measured and related to each other in a coherent way. The many different types and sizes of qualifications included in the NFQ, are organised based on their level of knowledge, skill and competence. Because all NFQ qualifications are quality assured, learners can be confident that they will be recognised at home and abroad.

Quality and Qualifications Ireland (QQI) has the responsibility to develop, promote and maintain the Irish NFQ. QQI also facilitates the recognition of foreign qualifications.

This course is at Level 6 on the NFQ.

Introduction to Consultative Selling

What is Consultative Selling?

Consultative selling is a sales approach that prioritises relationships and open dialogue to identify and provide solutions to a customer's needs. It is hyper focused on the customer, rather than the product being sold. This technique helps sales professionals better understand the challenges faced by customers so they can position their solutions in a more compelling and effective way.

Consultative selling skills help sales professionals position differentiated, compelling solutions. The outcome of employing a consultative sales approach is greater satisfaction and stronger relationships between the buyer and seller.

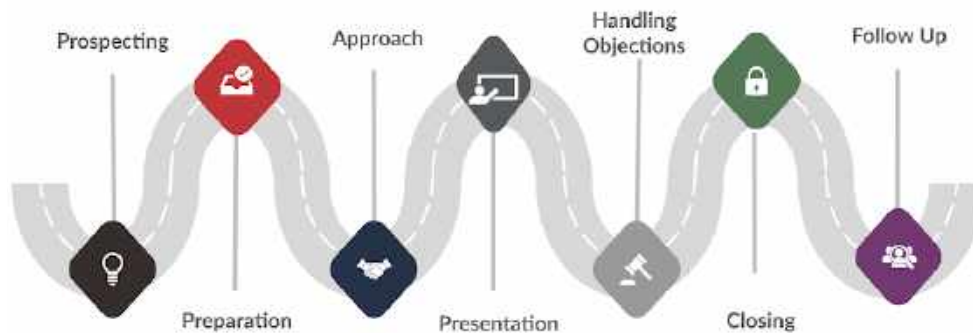


Figure 1. The Consultative Selling Framework

The Consultative Selling Framework

The Consultative Selling Framework provides sellers with a consistent, repeatable process to more effectively execute their sales conversations.

The Framework can be broken down into 7 steps.

1. Prospecting
2. Preparation

-
3. Approach
 4. Presentation
 5. Handling Objections
 6. Closing
 7. Follow Up



My notes on What is Consultative Selling?

Consultative Selling Vs Product Based Selling

One big difference between consultative selling and product selling is that consultative sales is more focused on the prospect and product selling is more focused on the product.

When we say focused on the prospect, we are referring to a sales approach where one tries to learn and understand the prospect's needs first and then tries to provide a solution that aligns with those needs.

Product selling is more of an approach that just focuses on explaining the product and features available and tries to persuade the buyer into wanting or needing the product that the salesperson sells.

When we break it down like that, it is pretty easy to see why consultative selling can be a more effective, more professional, and a more ethical way to try to sell to prospects.

To help you to see how you might transition from product selling to more of a consultative sales approach, here are some more specific examples of what a salesperson might do when trying to sell to a prospect using a product selling approach.

Product Selling

- Focuses on talking about the product
- “All about me” approach
- Assumes that every prospect needs the product
- Tries to sell the product to every prospect
- Focuses on selling products to prospects
- Tries to sell the product at every sales process step
- Salesperson does most of the talking
- Pitch centers around explanations and descriptions
- Talks about the product to try to make the prospect interested
- Focuses on the salesperson's interests
- Tries to overcome objections

Here are characteristics of what a salesperson might do when using a consultative sales approach.

Consultative Selling

- Focuses on talking about the prospect
- “All about the prospect” approach
- Questions if the prospect needs the product
- Tries to find prospects that are a good fit
- Focused on providing solutions to prospect’s needs
- Trying to sell the next step in the sales process
- Prospect does most or equal amount of talking
- Pitch centers around probing sales questions
- Talks about benefits, problems, ROI, client examples to make prospect interested
- Focuses on the prospect’s interests
- Tries to redirect objections

Each of those characteristics are basically the opposite of the same point on the other side. You may prefer one side over the other but if you can see how consultative selling might be a more effective way to go, stop to think about what you do or how you interact with prospects in these areas and make small changes that shift you to being more about the prospect than the product and this will take you in more of a consultative direction.¹

¹ "Product Selling Compared to Consultative Selling – Sales" 18 Mar. 2020, <https://salescripter.com/product-selling-compared-to-consultative-selling/>. Accessed 6 Jan. 2021.



My notes on Consultative Selling vs Product Selling

The Sales Person's Role & Responsibilities

As we are all aware, getting to know the customer and understanding their needs is not a quick and easy process. Customers possess a hierarchy of needs which have to be uncovered gradually. This is why we need a new type of salesperson for a new type of customer.

So what does this new breed of salesperson look like? For a start he or she has progressed from the more traditional, 'lone ranger' approach of selling to a more team-based consultative style. Our research shows that a consultative salesperson needs to fulfil three basic roles, that of Business Consultant, Strategic Orchestrator and Long Term Ally.

By combining all three roles salespeople are more able to develop and maintain long-term relationships with clients. At the same time, organisations need to ensure that they provide their salespeople with the vital support systems and training that enable them to make the most of their knowledge and skills

1. Business Consultant

Gone are the days in which a salesperson could simply walk into an office, establish a good rapport with the client, show he/she had thorough knowledge of their products and services and clinch the sale. Nowadays, the emphasis is on establishing long-term, mutually beneficial relationships and in order to achieve this, the salesperson needs to earn the right to continue discussions with his/her client. Before they can proceed to sell their products or services, the salesperson needs to reassure the client of their integrity, reliability and ability to understand and recommend the appropriate solution. They can do this by demonstrating;

- Up-to-date knowledge of business news and current affairs Best practices include - reading newspapers, magazines, journals, trade publications and other sources of business information; maintaining membership of appropriate professional organisations; acknowledging gaps in knowledge and taking steps to fill them; locating or developing databases with information on customers, their industries and their own customers.
- An in-depth understanding of the customer's industry, company and strategies as well as an appreciation of "the big picture". Best practices include - gaining an understanding of the issues at all levels of the customer's organisation including strategic, departmental and individual needs; seeking to understand the customer's perceptions of market trends, company direction, plus potential product and service needs.
- A readiness to exchange information and ideas between the supplier and client organisation. Best practices include - familiarising the customer with your own industry and companies; sharing useful business information even if it does not directly impact on the sales effort;

demonstrating the cost-cutting or revenue producing benefits of your products and services.

- The ability to listen and absorb information. Best practices include - refining the way you identify customer's needs by asking the right questions and listening actively to customer comments; speaking at the listener's level of knowledge; using stories and analogies effectively; asking for feedback on the clarity of your message. By demonstrating comprehensive knowledge, outstanding communication skills and the proper attitude, the salesperson earns the right to move beyond the role of supplier to that of a valued business consultant

2. Strategic Orchestrator

To fulfil this role, the salesperson needs to be seen as the key person responsible for engineering the appropriate solution. This involves coordinating all of the information, resources and activities needed to support customers before, during and after the sale. It means enlisting support from specialist colleagues and hence the move away from the "lone ranger" approach.

According to our research, effective Strategic Orchestrators have mastered the following competencies:

- Knowledge of their own company's structure
- Expertise in developing and managing a team
- Ability to manage priorities and performance
- Ability to coordinate delivery and service to customers
- Efficiency
- Flexibility

Customers of Strategic Orchestrators **express a high level of confidence** in the salesperson and his or her organisation. This increased confidence can lead to faster buying decisions, increased repeat business and strengthened links between customer and supplier organisations. Working as Strategic Orchestrators, salespeople are also able to develop their organisation's capacity for team selling.

3. Long Term Ally

Since the key to differentiation is in forging closer links with clients, the role of Long Term Ally is a crucial one. Once the salesperson has earned the right, it is important to develop and maintain the relationship.

As the term suggests, acting as a Long Term Ally, involves maintaining contact with the client even when there is no immediate prospect for a sale. It also suggests that the salesperson needs to be committed to the long-term development of the relationship. Our research shows that top salespeople demonstrate this commitment by continuously looking for ways to:

- Build interpersonal trust
- Create and maintain a positive image of the sales organisation
- Inspire respect for their company
- Show genuine concern for their customers' short and long-term interest
- Identify ways to strengthen the quality of their business relationship
- Help the customer meet needs within his or her organisation
- Deal with issues openly and honestly
- Deliver on promises: It is also crucial for the salesperson to ensure that the relationship between the organisations is mutually beneficial. In other words, it is essential to build and honour the expectation that reaching agreements will mean good business for both parties.

At the end of the day, taking a long-term approach proves more profitable since the customer will recognise that the salesperson is taking a committed interest and in so doing is giving honest and open advice. This inevitably encourages the customer to trust the salesperson and to view him or her as a colleague rather than an opponent

Long Term Allies and Mutually Beneficial Agreements

Supplier organisations must be willing to;

- Elicit feedback from customers regarding overall satisfaction with the products / services delivered
- Maintain regular contact with current and prospective customers
- Alert customers to new developments in own organisation
- Review the business relationship underlying each account on a regular basis

Buyer organisations must be willing to;

- Keep suppliers "in the loop" regarding the company's strategic direction and needs
- Value the record of service provided by supplier organisations above lower cost competitors
- Grant access and information about their customers to the supplier organisations²

Types of Consultative Sales Job Titles

- Business Development Executive/ Manager/ Director
- Sales Consultant
- Relationship Manager
- Account Manager
- Key Account Manager
- Strategic Account Manager
- Chief Sales Officer
- Customer Care Consultant
- Sales Manager
- Sales Development Representative

There is a huge range of titles companies can use for sales people and often there can be overlaps between titles. However, the three main job titles are the following:

1. Sales Development Representative (SDR), or Inside Sales:

- An SDR is usually an entry level sales position held by graduates or candidates new to the industry.
- The role does not involve working on the full sales cycle but rather they will be completing the first three steps, namely Lead Generation, Cold Approach and Meeting Booking.
- The purpose of the role is both to take pressure off those working in Business Development and to get to grips with the company/product. The role will more often than not lead into a Business Development position.

² "Consultative Selling: The Three Roles Of A Consultative"
<http://www.sideroad.com/Sales/consultative-selling.html>. Accessed 6 Jan. 2021.

2. Business Development:

- Business Development roles can be focussed on the full 360 sales cycle or on just the meeting and closing stages.
- A Business Development Executive will most likely be generating their own leads, conducting the cold approach and then booking meetings for themselves. In these meetings the aim will be to sell the product/service and then to close the deal.
- As a Business Development professional becomes more senior their time may be better spent focussed on the last two stages of the sales cycle. A SDR will book the meeting because the Business Development Professional will add more value solely focussing on the pitching and closing.
- There may be overlap between Business Development and Account Management where the responsibilities from both positions will be undertaken.

3. Account Management/Client Relationship/Customer Success:

- Once a deal is closed, the client/account will be passed on to an Account Manager or Client Relationship Manager to work on.
- The three key tasks for an Account Manager are Upselling, Retention and Client Satisfaction.
 - Upselling involves attempting to convince a client to use more or different aspects of the service/product on offer. This may involve increasing a client's yearly purchase of a product or persuading them to use a different product that the company has on offer.
 - Retention is key to any Account Management position. Here an Account Manager must keep a client on board year on year. If an account is lost that equates to money lost for the business so it is key that account managers retain their clients.
 - Client Satisfaction is ensured through the two tasks above. This can involve complaint handling as well as assistance of how to use the product/service.

- Despite seeming less “salesy”, Account Managers must be comfortable with consultative sales techniques in order to identify current client’s needs and then to fulfil them.³

Example of a Job Description

Business Development Sales Consultant Job Description	
<p>The Sales Consultant is responsible for pursuing new prospects and selling comprehensive media intelligence solutions. The Sales Consultant demonstrates a thorough understanding of the company's value proposition and will be responsible for all stages of the sales process.</p>	
Duties	<ul style="list-style-type: none"> • Prospect, identify and generate new opportunities to build a pipeline of targeted prospects. • Manage sales pipeline through sequential states of the sales process: prospect, initial outreach, product demo, negotiation and close. • Take a consultative approach with c-level executives while navigating multiple decision-makers. • Establish a “trusted advisor” relationship to determine needs, build value, and create engagement of Meltwater’s solutions. • Conduct activities including, outbound calls, emails, social selling and sales demonstrations with prospective clients. • Consistently exceed your monthly sales quota and be well compensated for doing so. • Successful consultants who have delivered excellent sales and leadership results will be given the opportunity to assume responsibility for a team of your own as a Sales Manager. • Meltwater offers its top managers the opportunity to run a business unit as a Managing Director. This opportunity can take place anywhere in the world, giving the Director the chance to move internationally depending on their experience and preference

³ "Consultative Sales - Timberseed." <https://timberseed.com/consultative-sales/>. Accessed 6 Jan. 2021.



My notes on The Role and Responsibilities of a Sales Person

Consultative Selling Environments

Business to Business Selling

What is B2B?

Business-to-business (B2B) is a transaction or business conducted between one business and another, such as a wholesaler and retailer. B2B transactions tend to happen in the supply chain, where one company will purchase raw materials from another to be used in the manufacturing process.

A B2B company is simply a business that provides needed goods or services to other companies. These include digital marketing companies, an e-commerce platform, co-working spaces and team communication platforms. Basically, any business that caters to other businesses is a B2B company.

In some cases, a business might have both B2B and business-to-consumer (B2C) operations. It is not uncommon, especially for larger companies, to maintain multiple types of businesses under one brand. For example, Dropbox offers cloud-based document storage to both individuals and businesses. Just because a company has B2B offerings does not mean it is exclusively B2B.

One of the clearest examples of a B2B market is automobile manufacturing. While most people are familiar with leading vehicle brands as consumers, most manufacturers also supply businesses. A prime example is the evolution of Jeep, which was initially made for the U.S. military but ultimately became a popular make of vehicle in the consumer market. There are also automobiles made exclusively for commercial use, such as Mack trucks.

What are B2B customers?

Who are the customers of a B2B company? Simply put, they are other businesses that need the support a B2B company offers, whether in the form of products or services. Take, for example, the co-working space WeWork. WeWork's spaces house a range of businesses small and large. In this case, the businesses renting space in a WeWork office building are the B2B company's customers.

The interesting part of B2B companies is that a business can at once be customer and partner. In the example of WeWork, an office furniture company might rent a coworking space. However,

WeWork might also purchase furniture from that company to furnish its space. In this hypothetical example, both B2B companies are buying from and selling to one another.

The buyer's journey for a business is often much different than that of a consumer. A B2B sales strategy should be adapted accordingly to suit the potential customer's decision-making process. Both marketing and sales to another business are often different, requiring a different approach to the sales pipeline and creativity from B2B company marketing teams.

How are B2B sales different from B2C sales?

The sales process for a B2B company's products and services can be vastly different from marketing to individual consumers. Generally, a B2B sales rep deals with a higher-level individual within a company, someone who has influence or decision-making power over the purchasing decision. These decision-makers are generally well versed in negotiation and eager to make deals, looking to secure the best price for their company. They are trained on how to research markets and find the best product or service as well as secure the best price.

Sales nurturing is a crucial part of B2B sales representatives' responsibilities. While the buying process for companies and consumers shares some similarities, they truly require a different approach on the part of a sales force. If you want to ramp up your B2B operations, it's important to consider your buyers and how they make a buying decision. Only by tailoring your sales pitch to their buying process can you find success. Here are some tips to help your B2B company thrive, including some common mistakes to avoid.

Typically, B2B sales require an additional level of professionalism when compared with the consumer market. In some cases, a B2B sales rep might be required to deliver a presentation to another company's executives. It's important that a B2B salesperson does their homework and has all the answers before the first meeting. After all, time is money, and it could be impossible to secure a second call or meeting opportunity.

In B2B sales, recurring business opportunities are the Holy Grail. While in the B2C market (depending on your business) recurring sales are nice, they are the lifeblood of any B2B operation. If you can secure several large accounts that repeatedly come back to your B2B company for goods and services, your revenue stream will often be stable and healthy. Your B2B sales force should be focused on cultivating relationships that will be longstanding and mutually beneficial⁴

⁴ "How to Land a B2B Sale - businessnewsdaily.com."
<https://www.businessnewsdaily.com/1184-b2b-selling-advice.html>. Accessed 6 Jan. 2021.



My notes on Business To Business

Business to Customer Selling

The term business-to-consumer (B2C) refers to the process of selling products and services directly between a business and consumers who are the end-users of its products or services. Most companies that sell directly to consumers can be referred to as B2C companies.

B2C became immensely popular during the dotcom boom of the late 1990s when it was mainly used to refer to online retailers who sold products and services to consumers through the Internet.

As a business model, business-to-consumer differs significantly from the business-to-business model, which refers to commerce between two or more businesses.

Understanding Business-to-Consumer

Business-to-consumer (B2C) is among the most popular and widely known of sales models. The idea of B2C was first utilised by Michael Aldrich in 1979, who used television as the primary medium to reach out to consumers.

B2C traditionally referred to mall shopping, eating out at restaurants, pay-per-view movies, and infomercials. However, the rise of the Internet created a whole new B2C business channel in the form of e-commerce, or selling goods and services over the Internet.

Although many B2C companies fell victim to the subsequent dot-com bust as investor interest in the sector dwindled and venture capital funding dried up, B2C leaders such as Amazon and Priceline survived the shakeout and have since seen great success.

Any business that relies on B2C sales must maintain good relations with their customers to ensure they return. Unlike business-to-business (B2B), whose marketing campaigns are geared to demonstrate the value of a product or service, companies that rely on B2C must elicit an emotional response to their marketing in their customers.

B2C Storefronts Vs. Internet Retailers

Traditionally, many manufacturers sold their products to retailers with physical locations. Retailers made profits on the markup they added to the price paid to the manufacturer. But that changed once the Internet came. New businesses arose that promised to sell directly to the consumer, thus cutting out the middleman—the retailer—and lowering prices. During the bust of the dotcom boom

in the 1990s, businesses fought to secure a web presence. Many retailers were forced to shut their doors and went out of business.

Decades after the dotcom revolution, B2C companies with a web presence are continuing to dominate over their traditional brick-and-mortar competitors. Companies such as Amazon, Priceline, and eBay are survivors of the early dot com boom. They have gone on to expand upon their early success to become industry disruptors.

Online B2C can be broken down into 5 categories: direct sellers, online intermediaries, advertising-based B2C, community-based, and fee-based.

B2C in the Digital World

There are typically five types of online B2C business models that most companies use online to target consumers.

1. **Direct sellers.** This is the most common model, in which people buy goods from online retailers. These may include manufacturers or small businesses, or simply online versions of department stores that sell products from different manufacturers.
2. **Online intermediaries.** These are liaisons or go-betweens who don't actually own products or services that put buyers and sellers together. Sites like Expedia, Trivago, and Etsy fall into this category.
3. **Advertising-based B2C.** This model uses free content to get visitors to a website. Those visitors, in turn, come across digital or online ads. Basically, large volumes of web traffic are used to sell advertising, which sells goods and services. Media sites like the Huffington Post, a high-traffic site that mixes in advertising with its native content is one example.
4. **Community-based.** Sites like Facebook, which builds online communities based on shared interests, help marketers and advertisers promote their products directly to consumers. Websites will target ads based on users' demographics and geographical location.
5. **Fee-based.** Direct-to-consumer sites like Netflix charge a fee so consumers can access their content. The site may also offer free, but limited, content while charging for most of it. The New York Times and other large newspapers often use a fee-based B2C business model.

B2C Companies and Mobile

Decades after the e-commerce boom, B2C companies are continuing to eye a growing market: mobile purchasing. With smartphone apps and traffic growing year-over-year, B2C companies have been shifting attention to mobile users and capitalising on this popular technology.

Throughout the early 2010s, B2C companies were rushing to develop mobile apps, just as they were with websites decades earlier. In short, success in a B2C model is predicated on continuously evolving with the appetites, opinions, trends, and the desires of consumers.

Because of the nature of the purchases and relationships between businesses, sales in the B2B model may take longer than those in the B2C model.

B2C Vs. Business-to-Business (B2B)

As mentioned above, the business-to-consumer model differs from the business-to-business (B2B) model. While consumers buy products for their personal use, businesses buy products to use for their companies. Large purchases, such as capital equipment, generally requires approval from those who head up a company. This makes a business' purchasing power much more complex than that of the average consumer.

Unlike the B2C business model, pricing structures tend to be different in the B2B model. With B2C, consumers often pay the same price for the same products. However, prices are not necessarily the same. In fact, businesses tend to negotiate prices and payment terms⁵.

⁵ "Business-to-Consumer (B2C) Definition - Investopedia." 11 Jul. 2020, <https://www.investopedia.com/terms/b/btoc.asp>. Accessed 6 Jan. 2021.



My notes on Business to Customer

A large, empty rectangular box with a thin black border, intended for the user to write their notes on Business to Customer.

Face to Face Selling

Face to Face Selling is another term used for personal selling. It is a process in which a salesperson interacts with customers directly in order to sell the product. Face to Face selling is marketing and selling products to customers using sales skills and marketing techniques. It can occur during a sales meeting or in a retail environment. Face to Face Selling is considered a cornerstone of sales. It can be done through presentations, persuasive pitch or demonstrations. For major sales people like to meet sales people rather than opting for telephonic or online buying. It involves direct communication between salesperson and client.

These techniques help building personal relations with customers which will benefit the bottom line. This is distinct from direct marketing because individual clients are being dealt here.

There are basic 5 stages in face to face selling;

- **Attention**

Capturing the attention of a customer can be your own personal presentation, your surrounding environment i.e an eye catching sign, decorated kiosk, welcoming shop/entrance.

- **Interest**

Showcasing a product or service of interest to the customer to engage them and want to know more, this could be a well thought out slogan or product/service name.

- **Desire**

Making the product or service desirable from a limited time special offer, limited edition, hugely popular and well reviewed.

- **Conviction**

The customer believes the product or service is for them, by buying into your pitch they will gain and meet their interest and desire.

- **Action**

This is the action of the sale, the process of the customer signing up, buying and purchasing your service or product.

In this era when products are just a click away it is quite expensive, time consuming, limited coverage and obtrusive when face to face selling is concerned. But it has advantages too like it builds customers trust, demonstrations help in selling products and focus on customers increase probability of conversion.⁶



Learning Activity

What type of selling environment do you mainly engage with in your current role? B2B, B2C or a mix of both? What are the reasons?

⁶ "Face to Face Selling Definition | Marketing ... - MBA Skool." 22 Jan. 2018, <https://www.mbaskool.com/business-concepts/marketing-and-strategy-terms/13019-face-to-face-selling.html>. Accessed 6 Jan. 2021.



My notes on Face to Face Selling

Telesales

A career in telesales requires excellent communication and sales skills and customer service knowledge. As a telesales representative, you will spend most of your working hours persuading prospective and existing customers to buy products or services. Understanding the skills and requirements of a telesales position can help you determine if it is an ideal career for you. Let's discuss telesales and how it differs from telemarketing and the duties and skills you need to excel in a telesales role.

Telesales is the selling of products or services through the telephone. As a telesales representative, you reach potential and existing customers directly by phone to encourage them to buy your company's offers.

There are two types of telesales: inbound and outbound. Inbound agents receive calls from prospective and existing customers while outbound representatives call leads to generate sales.

Telesales requires you to be patient, persuasive and persistent. You also need exceptional communication and phone skills, typing experience and the ability to thrive in an office environment.

The aim of telesales is to build repeat business through excellent customer relations. Telesales representatives contact customers to promote offers or to set up appointments to support field sales representatives.

The difference between telemarketing and telesales

While telesales involves selling directly to customers by telephone, telemarketing has a broader scope.

Telemarketers use phone calls to generate interest, offer information, obtain customer feedback and produce leads. The role of telemarketing is to create sales prospects, while telesales converts the opportunities into sales and repeat buyers of a company's products or services.

For a better understanding of telemarketing and telesales, consider their functions;

Telemarketing

Goals of telemarketers include:

-
- Providing the customer with information about a company's products or services in order to create interest in the brand
 - Helping telesales teams identify and qualify potential sales leads
 - Providing reliable and actionable data to support the telesales team to increase efficiency and productivity
 - Pre-qualifying prospects to make the work of sales teams easier
 - Generating repeat business by promoting new offers to customers
 - Converting customer inquiries into sales opportunities
 - Providing market research through outbound calling
 - Surveying customer satisfaction

Telesales

Goals of a telesales representative include:

- Using the data provided by telemarketing representatives to pursue promising leads with persuasion and persistence
- Converting difficult leads into customers
- Cutting costs per sales while increasing conversion rates by reducing travel expenses and number of field representatives
- Helping to reduce the number of people on the sales team
- Cold calling and helping to reduce negative reaction from leads
- Providing brand recognition by leaving buyers with an excellent impression of a company through effective customer relations, empathy and effective communication skills

Duties of a telesales representative

The duties of a telesales representative range from lead generation to direct sales and customer relations. An effective telesales agent will close leads and ensure customers are satisfied enough to continue doing business with their company. The duties of a telesales representative are:

- **Lead generation**

Telesales representatives play a vital role in generating leads for the sales team. They contact potential and existing customers by phone to inform them of their company's products, services and offers. Telesales agents also receive phone calls of people responding to direct marketing and advertising campaigns. They typically follow a script to qualify prospects ready to buy and those who may likely purchase their offers with enough persuasion. This prequalification process helps the field sales team to work faster and increases conversion rates.

- **Direct sales**

Besides creating awareness about products or services, telesales representatives also perform direct sales functions. Working with telemarketers and the sales team, they can use the data from previous sales to target customers for repeat business. Telesales agents can also ask promising leads qualifying questions which can help reveal their willingness to buy.

- **Take and process orders**

Telesales agents take and process orders to meet sales quotas. They manage repeat purchases, which provides opportunities to cross-sell existing customers. When customers place new orders, agents use scripts to offer additional products or services based on past purchasing behavior. This helps to boost sales and profits and allows the sales team to concentrate on selling in the field.

- **Customer service**

Excellent customer service delivery is part of a telesales agent's duties. To encourage customers to continue buying from their company, agents call them after a sale to make sure they are satisfied with the product or service. They also collect, compile and update

customer records in a database, making it vital to have excellent typing and telephone skills.

Telesales agents also inform customers of new offers based on their preferences and needs. Part of their customer service duties is to provide accurate information about the company, its products or services, promotions and other details. This makes it crucial for telesales agents to have in-depth knowledge of their organisation and its offers.

- **Conflict resolution**

Telesales agents must have excellent dispute resolution skills. Since they are always speaking with customers, they help to handle their grievances quickly before they become bigger issues. This allows customers to get maximum satisfaction from their purchases and preserves the company's reputation.

- **Activity reports**

An effective telesales agent will also create and update activity reports. The reports cover the number of calls, leads, customers, sales and other vital statistics that can help increase revenue.

- **Meet sales goals**

Telesales representatives need to meet monthly and quarterly sales goals according to the company's revenue targets. They must make a minimum number of calls and close a specific number of sales that moves them closer to their quotas.

- **Telesales representative skills**

Telesales representatives are required to have the skills sales representatives have and then some. This is because they do all the persuasion and selling on the phone without a physical meeting. Here are important skills you should have to excel at a telesales job:

- **Communication**

Successful telesales agents need to have excellent communication skills. They need to be able to start and maintain meaningful conversations with strangers.

Telesales representatives can quickly read the tone and pitch of the person they are speaking with and adjust their voice to create more rapport. They need to understand the customer's language and be able explain difficult concepts in easily understandable terms. Besides speaking in clear terms, they need to actively listen and be patient enough to hear customers' concerns. This allows them to provide personalised experiences for improved customer satisfaction.

- **Interpersonal skills**

Telesales representatives must have interpersonal skills. Selling on the phone requires the stability to create rapport with the other person without seeing them.

This involves using empathy, patience and persuasion to convert leads and convince existing customers to become repeat buyers. Emotional intelligence, active listening and conflict resolution are also vital skills for creating continuous business.

- **Experience in sales**

Telesales agents need to be knowledgeable in sales. Employers want candidates who can successfully meet sales quotas over the phone, set up appointments and follow up leads. They need to know how to use scripts to qualify prospective customers and convince existing buyers to purchase more products or services. A great telesales representative needs good negotiating skills to address customer complaints and convince them to buy at favorable rates.

- **Knowledge of telephone and computer systems**

A good telesales representative will have working knowledge of telephone systems. They also need to be knowledgeable about customer relations management software and computer programs required for their duties.

- **Fast learning**

Telesales agents need to have an in-depth knowledge and understanding of products or services so they can explain the benefits to customers and convince them to buy from the company. This requires agents to be fast learners because they rely on scripts to close leads.

- **Cool disposition**

If you want to pursue a career in telesales, you need to have a cool temper. Sometimes, the person on the other side of the phone may not be interested in talking, leading to tense situations. You must be able to handle rejection calmly without allowing it to affect your job.

⁷

⁷ "What Is Telesales? Definition and 6 Skills You Need ... - Indeed."
<https://www.indeed.com/career-advice/career-development/what-is-telesales>. Accessed 6 Jan. 2021.



My notes on Telesales

Email Selling & Marketing

Email marketing is the use of email to promote products or services while developing relationships with potential customers or clients. It is essentially direct mail done electronically instead of through the postal service.

What Is Email Marketing?

Anytime a company sends out an email, aside from order confirmations and direct responses to customer questions, it could be considered a form of email marketing. Email marketing is one segment of internet marketing, which encompasses online marketing via websites, social media, blogs, and more.

Email marketing can include newsletters with updates on the company, or promotions of sales and exclusive deals for subscribers. Marketing emails may also seek to share a general message on the company's behalf, such as in the wake of a natural disaster or company scandal.

At its best, email marketing allows businesses to keep their customers informed and tailor their marketing messages to their audience. At its worst, this kind of marketing can drive customers away with persistently annoying spam emails.

How Email Marketing Works

It's easy to set up and track an email marketing campaign, which makes it accessible for small businesses. You can add a newsletter sign-up option to your website, for instance. As people sign up, you can send newsletters to a growing audience. You can also direct customers to the newsletter from your social media profiles.

The two biggest advantages of email marketing are price and ease. Compared to other types of marketing, emailing is an inexpensive way to advertise your company and its products or services.

A regular newsletter is a simple and effective way to send updates about your company, upcoming events, and special offers. Email software also makes it easy to schedule automated promotional emails for customers who haven't purchased recently.

Email marketing allows you to target particular groups of customers or even specific individuals. Offering individual customers special birthday deals on merchandise or services is one way to do this.

A restaurant, for instance, might send an email to customers on their birthdays offering 50% off an entree. This kind of personalisation helps a business develop and maintain a relationship with a customer—and that can lead to increased sales and customer loyalty.³

One huge advantage of email over social media is that customers are more likely to see an email than social media. Just posting something on social media doesn't mean that everyone you want to see your message will see it. However, an email will sit in an inbox until it's read (or deleted).

Ideally, email marketing should go hand in hand with social media. Adding social media "Like" or "Share" buttons to your marketing emails gives an additional way for customers to connect with your brand. Snippets of positive reviews from social media fans can be included in emails, and social media posts can drive customers to your email newsletters.

Email marketing can substantially increase your income if you do it correctly. It's a great way to get people to visit (and revisit) your website or blog. More traffic usually equates to more income.

Email Marketing Strategies

Effective email marketing takes effort. Here are a few strategies for making the most of your email marketing campaigns.

- **Build Your Own List**

All you're going to do by sending an unsolicited email is turn off most of the people you were hoping to turn into customers. Whether through your website, in your store, or at an event, make it clear when customers are opting in to receiving your emails.⁴

- **Follow the Law**

Email marketers must adhere to the rules of GDPR. Essentially this means that, as an email marketer, you need to collect freely given information i.e the recipient must consent to receiving your emails and being contacted for marketing purposes and you must make them aware of how you store their information.

- **Mix Up Your Messages**

Don't just send out ads to buy all the time. Use your emails to build rapport with customers by sharing your expertise or that of others, giving them tips and insights they can value. Share information that lets them know more about you and your company.

- **Respect Your Subscribers**

Treat your list well. Remember that the people you're communicating with have trusted you with their information; they deserve your respect. If you want a chance to convert them from customers to fans and even evangelists for your brand, then make them feel special.

- **Follow a Schedule**

Stick to a schedule if you're doing a newsletter. Sending out an email on the same day (or days) every week will help your subscribers know what to expect from you and when.

- **Optimise for Mobile**

Studies by marketing analysts with the company Litmus have consistently found that just under half of all emails are opened on mobile devices.⁵ That means, if your email doesn't display correctly on mobile platforms, half of your audience is going to think you don't know how to properly craft an email.⁸

⁸ "Email Marketing: What Is It? - The Balance Small Business."
<https://www.thebalancesmb.com/email-marketing-2948346>. Accessed 6 Jan. 2021.



My notes on Email Selling

Social Media

Social media platforms such as Twitter, Facebook, LinkedIn, Instagram, and Pinterest etc. are all opportunities for marketing and selling online. They work best when part of an overall content marketing strategy, which emphasises the quality and usefulness of the content you create for your brand.

Don't forget the "social" in social media. Social media marketing works best as a conversation with your customers. It requires active participation rather than just posting ads for your products or services.

When selling on social media;

1. Identify the most used platform by your customers - if they are not using some platforms then there is no need for you to set up an account for every social media platform
2. If you receive a positive online review or have a happy customer create an appreciative social media post praising your product, you can even reference them in your sales pitches to build trust and credibility with potential customers
3. Analyse your insights regularly - if you have a post that performed well and received positive engagement then use this kind of content more regularly across all social media platforms and other marketing channels
4. Use social media to conduct competitive analysis - Not only can you see what content your competitors are sharing to engage with their audience, announcing new product launches, and promoting their current products, but you can also access comments and reviews to see how their customers truly feel about their products and use that as the basis for developing and seeking out opportunity for your own business
5. Vary your content also - using live video streams, imagery, videos, polls, competitions, website blog links (to increase traffic directly to your webpage also) to boost engagement and really be a social brand



Further Learning

Did you know DCM Learning can also provide you with a QQI Level 6 Digital Marketing course. This training course equips you with the skills to develop and execute a Digital Marketing strategy. Digital Marketing plays a vital role in any organisation and is a strong factor for consideration for sales and business growth. You can find further information on the DCM Learning QQI Level 6 Digital Marketing courses here:

[DCM Learning Digital Marketing Course](#)



My notes on Social Media

Skills and Qualities of a Great Salesperson

Presenting a Professional Image as a Salesperson

Sales professionalism refers to the commonly expected behaviors, etiquette and mannerisms for sales professionals. Salespeople increasingly rely on personal and professional attributes to build long-term rapport with customers. Combining professionalism with effective interpersonal skills and persuasive communication abilities typically leads to a strong selling performance.

- **Positive attitude**

When you sell, a customer not only buys your goods or services, but they also buy into a relationship with you as their salesperson. A professional seller projects a positive attitude, which reflects well on the business and themselves. To get a buyer to believe in your goods, you have to show belief in them as well. Closely related is confidence. If you have a positive attitude and belief in what you offer, you should convey an honest confidence.

- **Flexibility**

Salespeople hear "no" more often than they hear "yes." Even customers who end up buying may say "no" multiple times before an agreement. A professional seller doesn't get easily frustrated and show their emotions to a prospect. Buyers may also change their minds and ask for modifications to solutions after an initial order. Flexibility and self-control help in solving customer problems and building strong relationships.

- **Nonverbal Communication**

As much as sellers are known for verbal communication abilities, you project much of your professionalism through nonverbal factors. The way you dress and groom yourself contributes mightily to sales professionalism. In some environments, sellers wear suits and ties, while in others, business casual dress is more accepted. A straight posture, firm handshake and friendly facial expressions all help to put buyers at ease.

- **Strong Social Skills**

A top sales professional doesn't just talk a lot, but has strong social skills. The ability to carry on informal conversation with prospects is distinct from the ability to deliver a canned sales pitch. Building initial rapport by finding talking points, such as mutual interests,

compliments and here and now topics, is key in making sales. Your social skills help to get prospects to let their guard down and assist you in maintaining relationships.⁹

Customer Relationship Management

Customer relationship management (CRM) is the process of managing interactions with existing as well as past and potential customers. It is one of many different approaches that allow a company to manage and analyse its own interactions with its past, current and potential customers. It uses data analysis about customers' history with a company to improve business relationships with customers, specifically focusing on customer retention and ultimately driving sales growth.

Proactive/Solutions Driven

Being proactive is about taking responsibility and recognising that you have choices and you are not a victim of conditioning or external consequences. Reactive people, on the other hand, are often affected by their physical environment. They find external sources to blame for their behavior. If the weather is good, they feel good. If it isn't, it affects their attitude and performance, and they blame the weather.

One of the most important things you choose is what you say. Your language is a good indicator of how you see yourself. A proactive person uses proactive language—I can, I will, I prefer, etc. A reactive person uses reactive language—I can't, I have to, if only. Reactive people believe they are not responsible for what they say and do—they have no choice.

Proactive people focus their efforts on their Circle of Influence. They work on the things they can do something about, so naturally they have effective problem solving techniques and tools. Reactive people focus their efforts in the Circle of Concern—things over which they have little or no control, such as, a mistake, or something negative that happened in the past. Gaining an awareness of the areas in which we expend our energies is a giant step in becoming proactive

Warmth and Competence (product knowledge)

We are constantly assessing people on the scale of warmth vs competence. A successful professional image is a fine blend of warmth, (relationship skills) and competence (product knowledge). It's important to make a positive impression by cooperating and connecting with your

⁹ "The Characteristics of Sales Professionalism - Work - Chron.com."
<https://work.chron.com/characteristics-sales-professionalism-21895.html>. Accessed 26 Jan. 2021.

prospect. People expect warmth even more than they expect competence. People will excuse incompetence before they will excuse rudeness.

If an individual is seen as warm and competent, they are often admired. They are seen as trustworthy, carrying good intentions and able to achieve their desired results. Individuals in this segment of the matrix often become leaders, as they are both liked and trusted by others.

The Matrix of Warmth and Competence

	Competent	Incompetent
Warm	Warm/Competent Admiration	Warm/Incompetent Pity
Cold	Cold/Competent Envious	Cold/Incompetent Disrespect

The matrix of warmth and competence has 4 combinations or possible judgements that determine both assumptions and the behaviour or attitude we take with people.

High warmth and high competence results in admiration. High competence but low warmth creates envy. High warmth but low competence results in pity and low warmth and low competence generates feelings of contempt

We are constantly assessing people on the scale of warmth vs competence, based on both their verbal and non-verbal signals so it is important that we speak positively, using appropriate words and phrases and also exhibit positive body language at all times throughout our professional engagements.

Always project confidence and certainty in your communication. You can do that by honing your product knowledge, industry background and customer service skills. Customers prefer brands whose endorsers exhibit a solid understanding of and full confidence in the product's benefits. Avoid using these words/statements:

"I'm not sure"

"I think/I might"

"Maybe/Probably/Perhaps"

"Somewhat/Somehow"

"Whatever"

While the language of selling may vary across industries and markets, effective sales communication largely depends on a single factor: your customer. Get to know your customers – how they talk, what their key concerns are – Use the keywords and phrases your customers are using to establish a genuine connection.

Banishing Negative Stereotypes

Some negative comments that you will hear customers say about salespeople

"They lie."

"They'll do anything to get the sale."

"All they care about is their own commission."

"They are too pushy."

If you have a similar perception as a customer then do you think that these negative thoughts will affect your behaviour. If you believe that customers will perceive you in this negative light then you believe that you are going to fail.

So what can you do?

One thing you need to keep in mind is that people will not do business with you unless they like you and trust you.

You need to become a savvy problem solver, show them that you are there to help them whether they buy from you or not. You can show this by asking questions and listening more than you are speaking. Don't assume that you know what they need, you would be surprised what may be motivating their buying decisions.

Avoid the 'pushy' negative title by trying to avoid selling the features of your product or service. You may be overloading them with information. Stick to their problem and only offer information when it is solicited.

Show sincerity by building rapport with your prospect. This will start to develop your relationship with them. Be sincere about this. This is not a game. You truly want to find out what their problems are so you can help them

You can build trust and credibility by showing that you are knowledgeable about your product or service and potentially when applicable, knowledgeable about your customer

A great way to eradicate those negative stereotypes attached to salespeople is by being candid and honest. If you can't solve their problem say so. And if there is someone else that would be better for them to talk to, other than yourself, make that recommendation

Be professional and courteous. Be on time for meetings and follow up in a timely manner. This shows your prospects you have respect for them. Sometimes it really is the basics that are the basis of a strong relationship.



My notes on Presenting a Professional Image as a Salesperson

Listening & Questioning Skills

Active listening is a communication technique that helps increase understanding and rapport between a speaker and a listener. An active listener does not passively listen, they pay close attention to the other person's choice of words, their tone of voice and their body language. The speaker takes in all these components and then repeats back to the speaker the most important points the speaker was touching on, by summarising keywords and phrases used.

Active Listening Builds Rapport

Active listening is extremely helpful in building rapport between the listener and speaker. It shows the speaker that the other person is truly paying attention, which is especially important in the sales world. Prospects are often ignored or talked over because salespeople can be too focussed on making the sale, rather than listening to the true need of the person potentially making the purchase. Actively listening assists in building trust and ensures that the conversation results in a mutually beneficial experience.

Active Listening Avoids Miscommunication

Active listening is also one key way to avoid miscommunication, because the listener sums up the conversation, reiterates back the key points, and the speaker clarifies if the listener clearly understood.

When to Use Active Listening

The most obvious time to engage in active listening takes place during "qualifying and answering objections" . Often a salesperson's prospect will spontaneously offer useful information critical to identifying their wants and needs (and most importantly objections).

2 Times More Listening

A commonly-heard bit of sales advice is, "You have two ears and one mouth—you should be using them in that proportion." Spend twice as much time listening as talking. Prospects will drop clues as to what they're thinking and how they're feeling about you and your products or services. They're telling you what they like and dislike and what's important to them. This is precisely the information you need to close the sale, so by not paying attention, you'll have to work a lot harder to make the sale.

Active listening techniques include:

- Attending to the speaker without thinking about your own response
- Nodding, making eye contact, or otherwise affirming that you are listening
- Asking open-ended questions to elicit more information
- Clarifying your understanding with specific questions
- Watching body language to determine the speaker's emotional state and underlying meaning
- Paraphrasing the speaker's ideas to be sure you understood correctly

Questioning Skills

Besides listening, asking questions is one of the more important selling skills. Good questions assist in qualifying leads and reduce objections.

Questioning skills require a balance between planned questions and responding in the moment. Using only pre-planned questions can limit understanding of the true meaning customers may be trying to convey. On the other hand, if you do not give direction with planned questions, you may not gain the information needed to qualify the best solution

Planned questions can include questions about a prospect's current state of affairs, qualifying questions about needs, decision processes, and budget.

Open ended and probing questions are useful and necessary but they are also the reason many salespeople lose control of their sales interview and sales process. Too many open-ended or probing questions make the discussion too vague and without value. Asking, "What is going on in your business?" or "What are you hoping to do?" might be great conversation starters but the prospect can go in any direction and never speak about the areas of discomfort and pain. This is where probing questions can be helpful to inject when a prospect is elaborating and they stumble over an area that you feel if you probe further you may identify a pain or need for your product or service

Closed-ended questions are particularly useful and appropriate for prospects who talk too much. You also need them for those times you need a "yes" or "no" answer. Selling is helping people

make a variety of decisions, not just the final buying decision so closed questions facilitate making smaller decisions, for example, about the importance of specific features or benefits, internal decision processes, involvement of others etc. and this can help in reducing the sales cycle time frame.



My notes on Listening and Questioning Skills

Time Management

Ultimately, the key to time management for the busy salesperson is to work smarter, not harder. Get rid of distractions, prioritise and focus on your most important task: selling. When you manage your time rather than letting it manage you, you'll be more productive and successful, less stressed and more effective.

“Time is money.” It’s a familiar phrase that sales development representatives, business development representatives, and other sales professionals are intimately familiar with. But, as a salesperson, your time really is money. Most salespeople are not paid for the hours they put in. Typically, they’re paid based on their results: the more they sell, the more money they make.

It’s easy to feel like there aren’t enough hours in the day. But the problem may not actually be a lack of time, but how efficient you are with your time. Effective time management is critical to sales success, but it is also one of the biggest challenges.

Between prospecting leads, crafting messages, and tracking conversations and success, there are multiple demands on your time and attention. With limited resources and the fact that you’re judged by results alone, you are constantly being pulled in different directions and battling distractions. On the plus side, you have way more control over your work and earnings than people in other industries.

Since you can’t add hours to your day, it is imperative to make the most of the ones that you have. Using your time wisely will help you focus and, ultimately, boost your success. It’s one of the most useful skills a salesperson can have!

1. Track Your Time

When it comes to managing your time, the first step is to figure out where it goes. Most people are unaware of the habits that kill their productivity. If you’re suffering from too much to do and not enough time to do it, the best way to get it under control is to acknowledge and understand your habits. You can do this by tracking your time.

Try tracking specific tasks using an app like Toggl. If you think time’s getting away from you online, try using;

- [RescueTime](#)

or

- [Pomodoro](#)

to nudge you back toward productivity.

After a week, you should see some patterns emerging. Analyse your log to figure out where you can be more productive and adjust your activities accordingly.

2. Start With The End In Mind

People who set goals and monitor their progress perform 30% better than those who don't. Having goals increases motivation and achievement. However, not just any goal will do. The more specific the goal, the greater the likelihood of success. A goal without a number and a timeframe is a wish.

Setting goals is only half the equation. You need feedback too. Monitoring your progress will show you how much you have accomplished as well as what corrections need to be made.

3. Focus on the 20%

Most people are familiar with the 80/20 Rule: 20% of your time produces 80% of your results. Rather than focusing on tasks that have little impact on your success, concentrate on the ones with maximum ROI. Then, look for ways to either outsource or batch those low-ROI activities.

Another way to think about the 80/20 Rule is, 80% of your sales will come from 20% of your customers. That's true for a business, but many reps will have names on their list that will never buy and others that will become high-value, long-term customers. The sooner you can qualify, the better for you, so if you're doing your own qualifying, do it hard and fast, batch it, and remember: if there's an unqualified lead on the phone, you're not actually selling. You're either qualifying, or you're just talking.

4. Batch Appointments

When you have a meeting outside the office, think about who else you could meet in the area. It seems obvious, but how often have you found yourself wasting time driving out of your way due to ineffective scheduling? Grid your territory and meet with prospects and

catch up with current customers all within the same area. When you effectively manage your travel between appointments, you can meet with more prospective buyers, increasing your sales potential.

5. Stop Multitasking

You may think you're being more productive, but studies have shown multitasking actually slows you down. Your brain can't do two things at once. When you think you're multitasking, your brain is actually darting from one task to another in rapid succession. As a result, you lose 40% productivity because the brain is constantly shifting gears and trying to focus. Not only does multitasking kill your efficiency and performance, it's actually harmful. Prioritise your sales activities and focus on one thing at a time to maximise your success.

6. Batch Tasks

Grouping similar tasks together leads to greater productivity and efficiency. Block off a specific amount of time to make cold calls each day. Return calls at the same time each day rather than continually checking your voicemail all day long. Designate an hour or two in the afternoon for prospecting for the following day. Once the time is up, move on to another task. Scheduling activities this way improves your workflow because when you concentrate on one activity at a time, you become faster, better and more accurate.

7. Get To The No Faster

Chasing the wrong prospects costs valuable time you could have spent nurturing a viable lead. Most likely, you have a system to disqualify leads, but it can be hard to let go of a potential sale, even one that appears to have little chance. That's an error. Disqualifying leads as quickly as possible allows you to move on to ones that are more likely to become customers. So view a hard no as a good thing, it lets you know to stop chasing a dud lead.

8. Plan Your Day Around Your Customers

You've blocked out time on your calendar to call on prospects, but does that time suit your schedule or theirs? If you're not calling potential customers when it's convenient for them, you're not effectively managing your day. While research can tell you the best days and times to reach prospects, it comes down to knowing your target buyers' behaviors and routines. For instance, a noon phone call to a restaurant that is typically packed at lunch

isn't going to prove successful. Statistics are just a starting point; track your results and get to know your customers' schedules so you can reach them at their best times.

9. The 2-Minute Rule

If it takes less than 2 minutes to do, just do it.

There's a downside in theory: we're all subject to something called completion bias, meaning we like the feeling of ticking stuff off a list. So if we make our whole day about lists, it's easy to tick off a bunch of easy stuff, feel a sense of accomplishment and then look back on a whole day wasted on busy work. But – and it's a big but – many small, simple tasks simply don't deserve the energy that's expended on them to enter them into the system. These tiny tasks get magnified exponentially once we start treating them like projects. David Allen, author of *Getting Things Done*, is a big proponent of this approach. If something comes up in the day and it just takes a couple of minutes, don't schedule it: just do it.

10. Avoid Distractions

Distractions abound in the office, diverting your attention from your goals. While a minute or two of lost productivity doesn't seem like a big deal, it adds up over the course of the day. One way to combat distractions is to plan your day in advance. Whether you do it last thing in the evening or first thing in the morning, set your priorities for the day and focus on them.

Of course, some distractions are sneakier than others. Although social media is an increasingly important component of the sales process, spending 15 minutes checking updates and news feeds can easily turn into an hour wasted by browsing funny videos. Use distraction-blocking apps to prevent you from surfing the web and social media.

11. Take a Break

The simple act of taking a break improves your focus and increases your productivity. Tearing yourself away from the computer for as little as 10 minutes will help you clear your mind and improve your concentration. When you return to your desk, you will be refreshed and ready to tackle your next task. ¹⁰

¹⁰ "11 Time Management Tips For Busy Sales Reps - Datanyze." 27 Jul. 2016, <https://resources.datanyze.com/blog/time-management-tips-for-sales>. Accessed 7 Jan. 2021.



Learning Activity

Question – Assess your productivity by quantifying (by a percentage) how much time you feel that you are spending in each quadrant (look back at the last 5 days as a means of reflection)

URGENT	NOT URGENT
1. (Important)	2. (Important)
3. (Unimportant)	4. (Unimportant)

Question – Now identify ways that you can improve your productivity in order to spend the majority of your time in the Not Urgent/Important Quadrant



My notes on Time Management

Understanding Unconscious Bias

Unconscious bias is often defined as prejudice or unsupported judgments in favor of or against one thing, person, or group as compared to another, in a way that is usually considered unfair.

As humans, we do a lot without thinking about what we are doing. When driving, you naturally change gears as you accelerate. You blink frequently and regularly. You may think about what you are saying, but your mouth and tongue move automatically. When walking and stepping off the pavement, you retain your balance without a second thought. You don't make a conscious effort to breathe.

Our unconscious selves are more active than our conscious selves. As we grow older, our experiences and associated social factors become locked away by our brains to give us less conscious work to do. We develop actions, reactions and habits based upon our past. This is unconscious bias. Some unconscious biases improve our performance (like the ability to breathe while concentrating on other tasks). Other unconscious biases put us at risk of making poor decisions, discrimination, risk aversion, and other negative actions. One area in which unconscious bias is most impactful is sales.

There are three dominant types of unconscious bias in sales. These are:

- **Recency bias**, which makes us recall the most recent information; especially when we are subject to 'information overload'. This may cause salespeople to unconsciously ignore or forget information that could be a deciding factor in a sale.
- **Affinity bias**, which makes people gravitate toward people like themselves.
- **Rhyme-as-reason bias**, in which emphasis creates a more powerful argument than logic (for example, "no pain, no gain")

Such biases may manifest themselves in poor sales performance.

For example:

- Sales managers may unconsciously build teams in their own image, failing to capitalise on the affinity bias of their customers

- A lack of diversity reduces the capacity of an organisation to be innovative and see problems from different viewpoints
- Dealmaking is slower and less productive
- Weaknesses may be overlooked
- Sales revenues decline

A Positive sales environment and culture is a prerequisite to tackling unconscious bias at individual levels. There are many actions that can be taken to develop this.

These include:

- Using inclusive language in all communications
- Avoiding stereotypes in marketing messages and internal brochures
- Empowering an environment in which exclusion is 'called out'¹¹

Diversity in Sales

A diverse customer base means your revenue comes from a number of clients or customers - not just two or three. The more customers contributing to your sales revenue without a few dominating that figure, the more valuable and widespread your sales will be. Look for a broad customer base in which no single client accounts for more than 10 percent of total sales. An enterprise serving a multiplicity of customer types, or customers in unrelated industries, that are not affected by the same economic conditions further mitigates risk.

With such a broad customer base, it is important that as a salesperson you are adapting your selling behaviours to your diverse range of customers. Being mindful of cross cultural differences when dealing with International counterparts is essential for effective communication. Embracing their perspectives, even when extremely contrasting, can only result in growth and learning for you as a professional, which in turn will assist you in being more innovative with your future solutions and increase chances of customer retention and referrals for new opportunities.

¹¹ "Is It Your Sales Team's Unconscious Bias That Is Holding Back Your"

<https://www.forwardfocusinc.com/ignite-sales/is-it-your-sales-teams-unconscious-bias-that-is-holding-back-our-sales-numbers/>. Accessed 3 Feb. 2021.

Embracing Feedback

Becoming defensive when you or your work is met with criticism is difficult but unless you learn to overcome these instincts and embrace all feedback – good and bad – to improve your skills and professional approach, your career is likely to stall. The most successful people are those who can use constructive criticism as an opportunity for improving themselves. It is an important means of professional growth and development.

If defensiveness is your go-to reaction when being told you're being biased, then it's time to start reflecting on why you're responding in this way. By cultivating self-awareness you will be in a far better position to take steps towards changing your behaviour. A particularly effective technique for managing your response to feedback is to pause and breathe, and refrain from reacting defensively.

Diversify your critics

Remember that you can always ask for feedback from people, other than your Manager or boss. For example, consider inviting constructive criticism from team members, indirect supervisors, diverse range of customers or even friends and family members. Assure them that you appreciate honesty, and that you can take it.



My notes on Unconscious Bias in Sales

Networking Skills

Networking is not only about trading information, but also serves as an avenue to create long-term relationships with mutual benefits.

The importance of the saying “no man is an Island” has been proved to be the reason why many of us need to make a collective effort in the bid to achieve professional success. For many individuals that have succeeded in their career, the causes have largely been contributed to the strong networking channels they have created over time.

But the question of who you network with and their relevance to your career matters more. This way, you don’t have to network with everyone. Rather, first study how you can contribute to their success, in addition to how you stand to benefit from their knowledge.

In sales, networking is a necessary skill for finding new clients and centers of influence and building a strong referral pipeline. It is also a strategy used to open doors and build powerful relationships. However, many people fail to make personal connections when following up with initial contacts, so the focus becomes quantity rather than quality.

Time & Patience

As important as trust is, it takes time and patience to generate. When we network, we have to learn to respect others’ timetables. New contacts may not always respond in a timely fashion. They have their own deadlines and a lot of responsibilities, and we are not a priority. So, how can we move the process forward without being too aggressive?

1. Ask how they want to be contacted

Some people prefer that everything be done in writing, while others would rather receive a quick follow-up phone call or email letting them know about new opportunities.

2. Check in on new contacts regularly

Salespeople are often told to deal quickly with people without having a long-term follow-up plan in place. Mark your calendar for the next significant date on your contacts’ calendar. Call or email them a month before new information or material is sent. Or, even mention that you hope to connect with them at an upcoming conference or meeting.

3. Develop a networking game plan

Connections often do not develop into anything important because there is no long-term plan in place. Keep a list of all contacts readily available in your preferred database so you can develop plans for each contact and choose your style and method for continued communication. For instance, you may see that it may be effective to look for the contact at an upcoming business function, while another contact might appreciate a note with helpful information.

Once you discover what is effective, build on that and develop the skills you need to develop meaningful connections.

Follow-up Tactics

Effective networking is based on simple tactics. Here are seven rules of follow-up networking:

1. Smile

The people you meet for the first time will appreciate your warmth. Have you ever been at a meeting or function and felt frozen because you knew no one there? As soon as we see a sincere, warm smile, we feel more able to approach them. Research tells us that when you walk into a room or meeting and smile for 20 seconds, you will become more confident, approachable and someone that others want to get to know.

2. Make eye-contact

It's comforting to look at someone and effective eye-contact can connect you with someone new in the shortest time possible. Remember, eyes are the windows of the soul.

3. Listen

Commend people by simply listening to them. When we network with someone, it's like reading the paper. Let people tell their stories so we can discover the "news we can use." This will create starting points to develop rapport and conversation. People often hear yet they don't truly listen. Turn down the inner conversation in your head and focus on the other person. You will learn something with every encounter.

4. Body language

First impressions are lasting ones. Monitor expressions on the face. Sometimes, we need to loosen up because meeting new people can make us tense. People can “read” us by the way we communicate, which is especially important because 55% of communication is visual.

5. Avoid being too aggressive

Be careful about coming on too strong. Even if we just lost our job, avoid having people think that we are desperate or simply want something from them.

6. Give genuine compliments

Even with new contacts, a compliment can be appropriate. When we listen to people carefully, often they will mention something that they are proud of. We need to think for a moment to find a way to sincerely acknowledge others’ achievements.

7. Business cards are golden

Ask for people’s business cards, but only offer yours when someone requests it.

Networking is a process that can help create business connections to last a lifetime. Professionals must constantly develop, build and cultivate relationships that bring in positive results.

Power of Three

“The power of three” consists of writing a follow-up note to three contacts a day. The United States Postal Service tells us that only four percent of the mail is personalised. So, sending personalised notes puts you ahead of 96% of the competition. Here are some good examples where personal notes work particularly well:

1. “Heard something good about you”

If you hear about someone’s personal achievement or if you read something positive about their company, this gives you a good opportunity to send a note.

2. Give-away information

If you participate in an association meeting, invite a contact to join you as your guest at a special program by sending a note with a copy of the announcement for the event.

3. “Gone but not forgotten”

Even if your contacts have clearly stated that they are not interested in communicating with you right now, a follow-up note offering some valuable information is a good way to keep current and potential customers aware of your company.

The ultimate networking goal is to develop mutually beneficial relationships with people. It's important to reach out of our comfort zone and know more people, develop more relationships and learn that even with our strongest business accounts, it is good to “surround the account” and know several people at the organisation.¹²

Qualities of an Effective Networker

Many people offer advice about what it takes to be good at networking. This advice, however, often lacks a key piece of information: what the average person thinks it takes to be a better networker. Networking involves interacting with others, so what do most businesspeople think it takes to successfully network? Let us underscore the importance: We all need to be cognisant of other people's expectations and adjust our behavior accordingly if we want to make a positive impression that will help build a powerful network.

To that end, we gathered almost 3,400 survey responses from businesspeople around the world who represent both genders (57 percent men, 43 percent women) and ages that span a person's entire career. Six percent of respondents were under 30 while two percent were over 70. The bulk of respondents (78 percent) were between the ages of 30 and 59. We gave them a list of roughly 20 different characteristics on networking and asked them to pick the top behaviors they would like to see in a great networker. From those responses, we identified the top seven characteristics that people believe make a great networker.

Here are those seven characteristics in order of importance, according to the survey respondents;

¹² "The Importance of Business Networking in Sales Training" 25 Apr. 2013, <https://trainingindustry.com/articles/sales/the-importance-of-business-networking-in-sales-training/>. Accessed 6 Jan. 2021.

- **Good listener**

Being a good listener tops the list. Our success in networking depends on how well we can listen and learn. The faster you and your networking partner learn what you need to know about each other, the faster you'll establish a valuable relationship.

A good networker has two ears and one mouth and should use them each proportionately. Listen to people's needs and concerns and find opportunities to help them. You can't help others if you don't know what they need, and you find out what they need by listening. In many ways, networking is about connecting the dots, but to do that, you have to listen so you can help people make the connections they're looking for.

- **Positive attitude**

The first thing that people see from you is your attitude, how you handle yourself day in and day out. A consistently negative attitude makes people dislike you and drives away referrals; a positive attitude makes people want to associate with you. Positive business professionals are like magnets -- others want to be around them and will send their friends and family to them.

- **Helps others/collaborative**

People don't care how much you know until they know how much you care. Helping people shows that you care. One survey respondent said, "People want to network with individuals who have a collaborative attitude." Helping others can be done in a variety of ways, from emailing a helpful article to someone to putting them in touch with a person who can help with a specific challenge.

Several respondents commented about not wanting to network with people who are "in it for themselves." A willingness to collaborate and help others is essential as it builds trust and helps establish a strong relationship.

- **Sincere/authentic**

You can offer the help, the thanks and the listening ear, but if you're not sincerely interested in the other person, they'll know it! Those who have developed successful networking skills convey their sincerity at every turn. One respondent stated, "It's all about

the authenticity" that someone shows you. We've all seen people who are seemingly good at networking but lack sincerity. Faking it isn't sustainable -- and it doesn't work.

- **Follows up**

If you offer opportunities, whether it's a simple piece of information, a special contact or a qualified business referral, to someone who consistently fails to follow up, you'll soon stop wasting your time with this person. One respondent said that when it comes to networking, "The fortune lies in the follow-up" and that many people just "don't follow up anymore."

- **Trustworthy**

One respondent said it best: "It doesn't matter how successful the person is; if I don't trust them, I don't work with them." When you refer someone, you're putting your reputation on the line. You have to be able to trust your referral partner and be trusted in return. Neither you nor anyone else will refer a contact to someone who can't be trusted to handle it well.

- **Approachable**

One respondent said that people "will forget what you said and what you did, but they'll never forget how you made them feel." In other words, when you're approachable, people feel comfortable. When they feel comfortable, relationships are born. That's why effective networking always starts with approachability.

Each one of the characteristics above tie into the notion of building mutually beneficial business relationships. Only then will you succeed in creating a powerful network.¹³

Best Practices at a Networking Event

In general, building up your networking skill set takes practice and hard work. But if you are unsure of how to get started, fear not. This list of best practices will set you on the path to networking success. The more you apply these guidelines to your networking efforts, the better your results will be.

- **Seek out the best opportunities**

¹³ "The Importance of Business Networking in Sales Training" 25 Apr. 2013, <https://trainingindustry.com/articles/sales/the-importance-of-business-networking-in-sales-training/>. Accessed 6 Jan. 2021.

There is an old saying: Fish where the fish are. One key to successful networking is to identify places, events, and groups that cater to the kind of people you want to meet. Choosing the right opportunities will help you to best utilise your time and enable you to focus on building the right kinds of relationships to help your business.

- **Do your homework**

If you are planning on attending an event, research who will be there and identify people that you would like to meet. It may be helpful to look up people and companies on LinkedIn to prepare for potential conversations. Have a plan in mind before you arrive.

- **Go for quality over quantity**

Making 3 good connections is better than making 100 bad ones. Your best chance for growing a strong network is to have better interactions with fewer people. Having 1,000 business cards doesn't do you any good if you don't really know the people (and they don't know you).

- **Commit yourself to networking**

If you are attending a networking event, mentally prepare yourself in advance to initiate conversations and make connections. If you are truly committed to meeting new people, this may mean sitting with strangers, moving around the room to different spots, joining in on conversations, and developing other behaviors that you may not be naturally inclined to do. Step out of your comfort zone and be open to the possibilities.

- **Smile!**

In any networking setting, it is important to appear approachable. Body language can signal to others whether or not you are receptive to meeting new people, and the best way to show that you are friendly is to share a sincere smile.

- **Be authentic**

If you want people to relate to you and you want to build relationships, be genuine. There is little long-term value in pretending to be something or someone that you are not. Just be yourself.

- **Let them talk**

Dominating the conversation accomplishes very little. You are there to listen and learn. People like to talk about themselves and they like to be heard. Practice being a good listener and only speak up when you have something valuable to add.

- **Ask thoughtful open-ended questions**

One technique used by strong networkers is to ask open-ended questions. This draws others into the conversation and lets you focus on listening. And it's important to make sure your questions are relevant to the conversation.

- **Share your passion**

When you do talk, share something meaningful to you. Talk about something you are passionate about. You may find like-minded people or make others feel more comfortable talking about what is important to them. Either way, share something interesting instead of the usual small talk.

- **Avoid the hard sell**

The best networkers recognise the value of building good relationships. Having the right relationships in place can lead to sustained business success. Pushing for the quick sale is short-sighted and can turn people off.

- **Focus on helping others**

It may be counterintuitive, but the best way for you to help yourself (and your business) is by finding ways to help others. This builds relationships very quickly, and also makes you more memorable. Do it often enough and people will be going out of their way to help you.

- **Be a connector**

One way to improve relationships and build trust is to bring others together. As your network grows, you will begin to identify natural connections that you can help to facilitate. When someone is looking for help or advice, you can make an introduction or pass on the right person's contact information.

- **Exchange contact info**

Remember to exchange contact information with people you meet, when it's appropriate. Do not be the person looking to collect X business cards over the course of an event. Rather, exchange information when you have a good conversation, have mutual interests with someone, or have a topic to discuss at a later time.

- **Remember to follow up**

When you have made a connection, remember to follow up within a few days. If you made any commitments (e.g., to share an interesting article you saw, to send information about a product or a link to a useful website, etc.), remember to follow through on them. If not, it's good practice to reach out just to keep in touch.

- **Treat people with RESPECT**

One sure way to help your networking efforts is to treat people with respect—respect for their accomplishments, respect for their time, respect for their ideas, and respect for who they are. Make respect a cornerstone of your business network and watch it flourish.¹⁴

¹⁴ "Networking Tips & Best Practices | Santander Business First."
<https://businesshub.santanderbank.com/growing-your-business/best-practices-in-networking-what-you-need-to-know/>. Accessed 6 Jan. 2021.



Learning Activity Briefly explain the 3 types of Networking and create a network list of contacts relevant to you for each

Type of Networking	Operational	Personal	Strategic
Explanation:	<p><i>*Focus on your daily tasks</i></p> <p><i>*Building good relationships with people who can help you to do your job</i></p>	<p><i>*Focus on personal development as a salesperson</i></p> <p><i>*Developmental support such as coaching/mentoring</i></p> <p><i>*Continuous advice and perspectives that help you progress in your career</i></p>	<p><i>*Recruiting stakeholders</i></p> <p><i>*Lining up prospects</i></p> <p><i>*Mutual gain partnerships Linked to operational objectives</i></p>

<p>Network of Contacts: (Relationships built to help you achieve your objectives in each category)</p>	<p><i>*Example, colleague in another department)</i></p>	<p><i>*Example, a mentor or coach</i></p>	<p><i>*Example, a potential investor</i></p>
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My notes on Networking Skills

Storytelling

Storytelling has existed long before recorded history. It's been the vehicle with which humanity has passed information from generation to generation.

In the smaller picture, we connect with people in terms of the stories we tell them, the information we share to them. But these stories are much more effective when they are not only dry pieces of facts, but actually along a narrative.

Storytelling is a must-have sales skill.

Here are the reasons why;

1. People retain more through stories

Stories. We remember them. That cartoon you were watching when you were five. That story grandma told you when you were seven. You may still have some recollection of that story about how Alexander Graham Bell invented the telephone.

When facts and data are framed within a compelling story, you will hold the listener's attention and help them connect bits and pieces of the story to their context.

This results in better retention—something we want in our prospects. Imagine. If after the call they are in a situation that was similar to one that you mentioned in your story—say, you're selling information security software and there was a report of an attempt to breach their server's security—guess what will come to their mind? It's just natural that they will recall your story and not a dry pitch from another salesperson.

Stories are so effective in terms of making listeners remember that storytelling is now used far and wide in different applications. Of course, the shoe in is in marketing. Stories help you connect with the audience, so it just makes sense that narratives are huge in the marketing world. In training, storytelling is becoming a respected technique that's recognised for its effectiveness. Participants cognitively retain information more completely and efficiently when taught in story form.

The London School of Business did a study on this and it confirmed what was experienced by people who've been using storytelling as a means to transfer information and convince people.

People retain 65 to 70 percent of information shared through stories while only 5 to 10 percent of information is retained through dry presentation of data and statistics.

Since the sales process is very rarely a one-call affair, you want to stay on your prospects' minds. Make the customers remember you by telling stories.

2. Stories appeal to both logic and emotions

Sales departments put together presentations that show why their products are the best logical solutions for clients. It's very important to know your product inside and out, and be able to pair the features with the scenarios clients face everyday in their business.

However, being armed with all the features, numbers and tailor-made benefits is not enough to get you to a close.

If you think these are enough, you are probably getting a low close rate. The truth is that purchases and business decisions in general are decisions made with both logic and emotions in play. The Broca's area of the brain is stimulated during a presentation or even a dragging pitch. The Broca's area deals with cognition and logic. When listening to stories with rich imagery and meaning, the brain is stimulated as a whole. When this happens, emotions and logic are in play. Subjective biases are tapped and are considered when thinking. When demos and even just conversations are composed of stories, the human brain is gripped.

A salesperson who knows how to use storytelling to engage and lock in a prospect is one who can close by making prospects feel. Stories connect human beings at an emotional level.

3. Stories make clients visualise the product in the context of their operations

There is no substitute to understanding the situation of your prospects. Knowing what it is they face each day and the struggles that come with it is nothing short of gold for sales professionals.

Sales professionals may be smart to bring up pain points and prospects' experiences as they discuss benefits—but nothing will work better than a story.

What kinds of stories could you use, for example, in a situation where you're presenting benefits to your prospect?

Experience is powerful—even when it's not yours. Use the experiences of your other clients, preferably in the same industry, to tell the story of how your product improves business. Take the prospect through the process. Present the case study in story form.

Tell them about the initial doubts that your other clients had and how those doubts were completely arrested when the product was onboarded. Let the details speak—what improved in your clients' lives, how much did they save, what did they thank you most for. Believe me, your prospects want to hear this! They want nothing more than assurance that your product already became a success story. Then, they'll want to be the next one.

Aside from case study stories, prepare by making hypothetical situations where your product can help. Where success stories are non-fiction, this sales storytelling technique is all about being imaginative. Given you've researched about your prospect's situation, help them visualise the product in their own operations by telling a compelling story of how your product helps a certain, fictitious business.

Be careful not to get carried away. Do not overstate! Remember that fiction is an amazing tool to tell the truth. Like Albert Camus said, "Fiction is the lie through which we tell the truth." So stick to realistic scenarios and make it as detailed as possible within the realm of what's logical.

Sales Benchmark Index say that a good sales story has these components:

- **The Hero** – the main character with whom the prospect can relate to. The Hero should share some traits with the prospect and must find himself/herself in situations that are similar or are metaphors for what the prospect regularly experiences.
- **The Stimulus** – something that pushes the Hero towards solving their own problem or changing the situation for the better. This could be likened to your product or the sales process you're in right now.
- **Tension or Conflict** – problems, struggles, trials and dangers the Hero needs to overcome.

- **A Crossroad** – the moment of decision where the Hero needs to choose a path to bring him to the solution. In the sales process when you're using a case study story or the prospect's situation, this portion is when the client makes the purchase.
- **The Moral of the Story** – where the hero's problem is solved by the solution he or she found.

Also, sales stories are stories, they should be structured like so—with a beginning middle and end. Storytelling extraordinaire Kambi Crews says, "The beginning should hook your audience, while the end, the call to action, must be clear."

4. Stories encourage action

If you're successful in making your stories relevant to the prospect's situation and you were able to grip them and their attention, you are in a great position to influence their buying decision. The way you position your brand and your product in your stories is essential in getting that yes.

See, the call to action should be strong and authoritative. Like we said, it should be right both in the logical and emotional sense.

Here are some techniques to make sure that your prospect is hooked until your call to action:

- **Make it about them** – Even when you're talking about other clients or hypothetical situations, make it so that the client can see themselves in the stories ALWAYS.
- **Keep stories straight to point** – No need to be flowery and overly literary! We're not writing an epic, we just want to hook the prospect. If you prepare well, you'll get the points across succinctly.
- **Use imagery** – Learn to tell stories that paint scenarios. Stories are a great leap from dry presentations, but don't make your stories dry! Practice them on colleagues if possible.
- **Use humor** – Great timing is a gift. If you have it, don't be afraid to make your prospect laugh here and there. Just don't overdo it! There's a thin line between clever and being a sideshow.

Big and small brands use storytelling to pull in people, so why don't we use that technique in sales. It makes the sales process human, relieves us of dry communication that plague many sales departments.

Successful inside sales professionals know how to use available information and bring them to life through stories. There's no shortage of experience on the side of your company and that of your prospects. You just need to develop a keen eye on information that will figure in neatly along your stories.

Storytelling is a must-have sales skill, make the prospect the hero and make them see how their trials can be solved by your product without having to force the issue.¹⁵

When to Tell a Sales Story

There's no bad time to use a sales story. You can tie a story to almost anything a prospect says. Here are three examples:

- **Understanding value**

"We work with hundreds of CMOs with similar challenges. We understand those challenges and have the best practices and insights to help you. Let me give you an example: we were working with a CMO in a very similar situation to you ..."

- **Overcoming the "we already have something in place" objection.**

"That's great. Many of my customers came to me having X product. As a matter of fact, I was recently working with a CMO like you who had X product. His challenge was ..."

- **Overcoming a price objection**

*"This guy who became a huge client of ours originally had a very tight budget with the CIO. Here's what he did ..."*¹⁶

¹⁵ "Why Storytelling In Sales Is A Must-Have Skill - Tenfold."

<https://www.tenfold.com/sales-performance/storytelling-in-sales>. Accessed 6 Jan. 2021.

¹⁶ "The Elements of a Compelling Sales Story - HubSpot Blog." 8 Sep. 2014,

<https://blog.hubspot.com/sales/elements-of-a-compelling-sales-story>. Accessed 6 Jan. 2021.



My notes on Storytelling in Sales

Building Your Personal Resilience

What is Personal Resilience?

Personal resilience is a human nature to resist change, particularly when it comes in the form of adversity or challenges. But change is inevitable, and developing the trait of resilience helps us not only survive change, but also learn, grow, and thrive in it.

Resilience is the capacity to cope with stress and adversity. It comes from believing in yourself and;

- The ability to perform under pressure
- Bounce back from difficult circumstances and overcoming setbacks
- Manage our overall health and wellbeing
- Understand how to achieve and maintain optimum performance
- Its being able to strive for balance and harmony
- Understanding and being able to play to the strengths of our personality
- Resilience is a skill set that can be learned and acquired so that situations work for you rather than against you

Finding your Optimal Level of Pressure

Pressure drives people into action. It fuels a sense of urgency to accomplish a task. Pressure is necessary and desirable up to a certain point. However extreme and prolonged pressure can lead to distress which leads to stress which is outlined above

- Boredom – frustrated or feeling under-involved, hard to motivate yourself when you have no challenge
- Optimum – effective, creative, decisive, alert and stimulated, easy to motivate yourself because you are sufficiently challenged
- Burnout – you are exhausted, fatigued, irritable, anxious, overloaded

In summary we manage our stress by either reducing pressure or by increasing our coping resources or a combination of both.

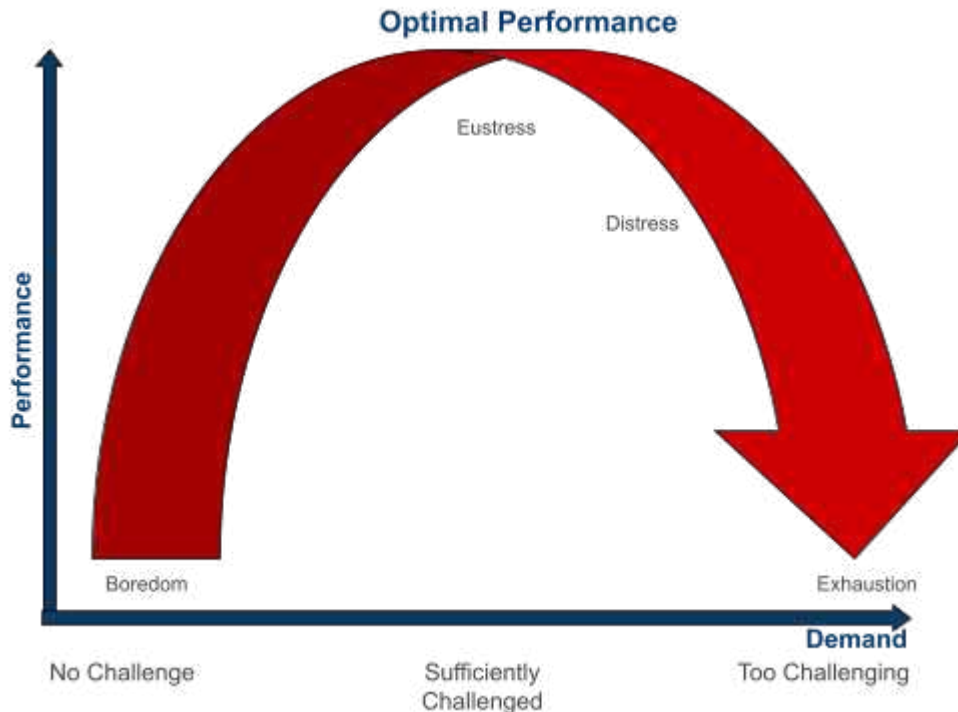


Figure 2. Optimal Performance

Staying Mentally Strong during Setbacks

It's important to know that setbacks will happen. Being a perfectionist about yourself will just leave you frustrated and tempted to give up. Sometimes setbacks will happen because of you (bad decisions and mistakes) and other times it will be for reasons beyond your control. We should adopt the same strategy to overcome regardless of the conditioning of the setback

Building resilience is key. How can we do that without having experienced setbacks. It's experiential learning at it's finest. The positive is that with setbacks you are constantly setting a new benchmark for your resilience – accepting and understanding that this is everything to do with being human is very liberating!

5 Pillars of Resilience

Resilience is made up of five pillars: self awareness, mindfulness, self care, positive relationships & purpose. By strengthening these pillars, we in turn, become more resilient. Instead of experiencing an overwhelming downwards spiral when we encounter stress in our lives, these five pillars work together to lift us up out of the chaos we are feeling.

Obtaining and maintaining these skills takes practice.

1. **Self Awareness** is having a clear perception of your personality, including strengths, weaknesses, thoughts, beliefs, motivation, and emotions. Self Awareness allows you to understand other people, how they perceive you, your attitude and your responses to them in the moment.
2. **Purpose** is a recognition that we belong to and serve something bigger than ourselves. Our purpose helps to shape the mindset and attitude we have toward others and the events we experience. We can find purpose in our faith, family, a political party, being green, or being a part of an organisation
3. **Mindfulness** is a state of active, open attention in the present. When you're mindful, you observe your thoughts and feelings from a distance, without judging them good or bad. Instead of letting your life pass you by, mindfulness means living in the moment and awakening to experience.
4. **Positive Relationships** are the people who support and care for us — and we care for them. One of the most profound experiences we can have in our lives is the connection we have with other human beings. By building positive relationships with others, we will be happier and more fulfilled and feel more supported, supportive, and connected. Positive and supportive relationships will help us to feel healthier, happier, and satisfied.
5. **Self care** is unique for each person and can be understood in many different ways. In its simplest form, the term refers to our ability as human beings to function effectively in the world while meeting the multiple challenges of daily life with a sense of energy, vitality, and confidence. Self care is initiated and maintained by us as individuals — it requires our active engagement.



Learning Activity

Question – Can you reflect on a time in your life where you experienced a setback that ended up having a positive outcome?



My notes on Building Your Personal Resilience

Sales Planning

A sales plan is the "who, where, why, when and how" that will guide you to hitting your sales goals for the year.

Big picture aside, a sales plan is a month-to-month forecast of the level of sales you expect to achieve and how you're going to get there. It covers past sales, market concerns, your specific niches, who your customers are, and how you're going to find them, engage with them, and sell to them.

If done correctly, the right sales plan empowers you to spend even more time on growing sales, rather than responding to the day-to-day developments in sales.

Armed with the information you'll compile within your sales plan, you can quickly identify any upcoming problems, sales droughts, or opportunities—and then do something about them.

Not having a plan is like running your business on a wing and a prayer and hoping you might get lucky. While there is a chance you might get lucky and hit the bulls eye, there is a better chance you'll poke someone's eye out

So why do sales people leave it to chance, and not write a yearly sales plan? More often than not it's because they may not know how, and no one in the organisation has written one either to help coach them through the process.

"Don't just think it ink it"¹⁷

Creating a Successful Sales Plan

Each part of the sales plan naturally works itself into the next, starting with your high-level goals, then taking into consideration market factors, and finally looking at who you know, and how to find more prospects to help hit your sales goals.

¹⁷ "Why Sales Planning is important in helping you achieve your" 14 Feb. 2020, <https://funnelflare.io/blog/why-sales-planning-important-helping-you-achieve-your-sales-goals/>. Accessed 6 Jan. 2021.

Define your Mission

A mission statement is a short statement of why a business exists, what its overall goal is, what kind of product or service it can provide, its primary customers or market (who), and its geographical region of operation. It may include a short statement about an organisation's values, a business's main unique value proposition or a desired future state

A mission is an expression, made by its leaders, of their desires and intent for the organisation. The purpose of a mission statement is to communicate the organisation's purpose and direction to its employees, customers, vendors, and other stakeholders. Examples:

- **Apple**

“To bring the best personal computing products and support to students, educators, designers, scientists, engineers, businesspersons and consumers in over 140 countries around the world”

- **ASOS**

“To become the number 1 fashion destination for 20-somethings globally”

- **Paypal**

“To build the Web’s most convenient, secure, cost-effective payment solution”

- **LinkedIn**

“To connect the world’s professionals to make them more productive and successful”

- **Walt Disney Company**

“To be one of the world’s leading producers and providers of entertainment and information, using its portfolio of brands to differentiate its content, services and consumer products”

Take Measure of the sales target

Base your sales plan on sales performance from the previous year or 6 months where possible. This will make your expected revenue, as outlined in your sales plan, realistic. You can choose to

increase your target by a particular number based on previous performances. You can also look at what areas need development based on previous numbers and include them in your sales plan.

For instance, if you identify in your previous years sales performance post mortem that very little revenue was generated from your existing client base then you may include specific target figures and actions in your sales plan in order to increase customer retention for the year ahead. Your sales target included in your sales plan can either be a monetary value (increase in revenue by €10,000) units sold (increase in units sold by 100) or new accounts (increase in new customer accounts by 20).

Looking back will always help you to base your sales plan on a realistic target. You should project your sales target on market research efforts - market trends, public information of similar organisations your size, competitor analysis, buying behaviours and surveys.

Break the numbers down

When creating your sales plan it is important to break your target value into chunks that can be organised and ultimately achieved more effectively

For example, a large sales target of €50,000 broken down might look like this:

- €10,000 Existing Maintenance Accounts
- €15,000 New Product or Service Sales from Existing Accounts
- €15,000 New Accounts with Existing Opportunities
- €10,000 New Opportunities from Dormant Accounts

Looking at the target this way makes it more manageable, and easier to develop a detailed plan

Identify Obstacles

Salespeople who understand the obstacles they are likely to face can be prepared to overcome them. As part of the planning process, it is important to brainstorm what might get in the way of achieving your goals, as well as tactics for overcoming those obstacles.

External factors, such as a disruption in your industry or an important account leaving, could be problematic. Obstacles can also be internal, such as failure to market specifically in line with your

sales plan or poor quality leads. Identifying and addressing obstacles early on gives you a greater chance for success.

Conduct a SWOT Analysis

A SWOT analysis can help improve the way you do business. It is designed to help identify problem areas and resolve or address areas that can be enhanced. It stands for Strengths, Weaknesses, Opportunities, and Threats.

SWOT Analysis	
Strengths Employees Brand Location Reputation Process and systems	Weaknesses Limited area for company services High cost products Low budget for additional support Old technology and resources
Opportunities New Technology Lack of dominant competition New markets Unique services	Threats Changes in production costs Increased competition Customer purchase trends Competitor prices

Establish an action plan

Once you understand what numbers need to be met and where the opportunities and obstacles lie, you can work to identify an action plan. Identify specific actions or projects you can execute to move towards your goals. Then, be sure to list out the high-gain activities involved in the strategy that you can execute on a daily, weekly, and monthly basis to get to where you need to be.

Example:

- Your **goal** may be to increase sales of a specific product with current customers by nurturing relationships.
- One **strategy** to achieve that goal could be to join the professional networking groups those clients are members of, and actively participate in virtual and in-person events.
- You can then list out the **activities** you'll need to complete in order to execute the strategy. For instance, requesting approval to join the professional networking group, sending notes to your clients who are members telling them you look forward to collaborating with them.

This top-down approach will help you manage your time better on a day-to-day basis. It will also give you a clear path to reaching your sales goals

Execute the sales business plan

The final and most important step of the business plan is execution. You should keep your sales action plan where you can see it each day and then schedule the activities you committed to on your personal calendar. By prioritising and carving out the necessary time, you will have no excuses when it comes to execution – and will be well on your way to success

Sample Sales Plan:

Boyle's Events & Venue Sales Plan

Mission

To be the leading venue for live music events in the South East through delivering high quality live events and service excellence consistently

One Year Sales Objectives

Objective	How Objective will be measured	Audit Frequency
1. Increase brand awareness	New customer engagement from monitoring social media, Inbound calls and enquiries	Monthly
2. Selling out at least 20 bi weekly Tribute Act show	Ticket sales	Weekly
3. 20 extra Private Function bookings	Private booking provisional and confirmed bookings	Bi-Weekly
4. Increase Revenue by 20,000 from previous year	€8000 extra from event Tickets sales (box office) <ul style="list-style-type: none"> • €8 - €30 €12,000 extra from Private Function bookings <ul style="list-style-type: none"> • €150 without catering • €270 + to include catering and music options 	

Customer Segments

Segment Name	Profile
Regular Socialisers	<ul style="list-style-type: none"> ● Under 30s ● Pre-Family ● Socialise in groups ● Instagram users ● Socialise every weekend
Music Fanatics	<ul style="list-style-type: none"> ● Alternative music interest ● Musicians ● Regular gig goer ● Enjoy exploring new music/artists ● Instagram and Facebook users
Reserved	<ul style="list-style-type: none"> ● 45 yrs + ● Only socialise to attend event ● Couples ● Corporate customers ● Enjoy a sociable drink ● Leave straight after an event ● Facebook users
Ad Hoc	<ul style="list-style-type: none"> ● Over 30 ● Socialise on average once a month or 6 weeks' ● Attend events in order to meet with friends ● Can have young families ● Instagram and Facebook users

Strategies and Tactics

New Business Acquisition	Existing Business Growth
<ul style="list-style-type: none"> ● 60 direct sales calls per week ● Monthly Radio Advert ● Bi Annual Print Advert ● Monthly Online Publication Advert ● Social Media Competition for larger events to attract outside trade 	<ul style="list-style-type: none"> ● Acquire email addresses to subscribe to monthly newsletter ● Roll out Premium Annual Members Club ● Offer first refusal to regulars for larger events

Managing Progress

Measurement	Time Frame
<ul style="list-style-type: none"> ● Asking new customers where/how they heard about our venue ● Customer satisfaction survey/feedback to monitor possibility of repeat purchases/bookings ● SWOT Analysis for internal improvement and maintenance and external opportunity and obstacles <ul style="list-style-type: none"> ○ Staff feedback ○ Staff performance monitoring/feedback 	<ul style="list-style-type: none"> ● On purchase ● After each event ● November and June ● Pre and post event team meetings ● Weekly one to one meeting

Identify Obstacles

<ul style="list-style-type: none"> ● Location ● Limited taxi services ● Pandemic changing socialising behaviours and standards of living ● Depending on new customer acquisition regularly to sustain the business ● Increasing prices of booking live music

Roles and Responsibilities

Team Member	Summary of Responsibility	KPI
Rachel Lawlor - Private Events Coordinator	<ul style="list-style-type: none"> ● Promoting the venue as the preferred choice for private functions within the South East. ● Liaising with private event organisers and personnel. Working within budget requirements and coordinating third party suppliers, where applicable, and with internal staff members within specified timeline 	<ul style="list-style-type: none"> ● Private Function Bookings 3-4 per month
Niall Murphy – Box Office/Sales Manager	<ul style="list-style-type: none"> ● Managing the box office inbound event bookings and direct sales activities for individual and group purchases ● Marketing tactics to increase brand awareness and encourage new customer acquisition and repeat business 	<ul style="list-style-type: none"> ● Ticket sales ● Sell out 20 bi-weekly tribute acts for the year ahead ● On average 80% conversion for all other events

Budget

Expenses	Estimated Annual Value
Telephone	€600
Artists fees and expenses	€49,000
CRM system subscription	€300
Salaries (to include casual staff)	€80,000
Bar Stock	€12,000
Electricity	€6,500



Learning Activity

Create a Sales Plan for your business or an organisation you are familiar with;

Mission

One Year Sales Objectives

Objective	How Objective will be measured	Audit Frequency
1.		
2.		
3.		

Customer Segments

Segment Name	Profile

Strategies and Tactics

New Business Acquisition	Existing Business Growth

Managing Progress

Measurement	Time Frame

Identify Obstacles

Roles and Responsibilities

Team Member	Summary of Responsibility	KPI

Budget

Expense	Estimated Value



My notes on Sales Planning

The Consultative Selling Process

The Needs Satisfaction Theory

Need satisfaction selling “is an approach to selling based on the notion that the customer is buying to satisfy a particular need or set of needs”

The needs satisfaction theory brings forward an interactive approach or a win-win solution, where the prospect and the salesperson communicate with each other to ensure mutual satisfaction of both the parties.

The salesperson enquires and understands the requirements, wants and expectations of the prospect and then presents a suitable product/service to achieve consumer satisfaction.

Here, the salesperson gets a chance to associate the product/service features with the prospect’s needs and desires. The salesperson has the power to convince the buyer by highlighting the benefits the product will generate to satisfy his/her specific requirements. With this approach the prospect feels valued and listened to.

The theory states that the salesperson should explore and identify the prospects needs and expectations before he or she presents the product to the prospect and closes the deal. Here the salesperson should actively listen to the buyers objections and then answer them keeping the customer needs in mind. It is believed that unless the sales people know their prospects' needs and have in-depth product knowledge they can never sell, create and retain a satisfied customer.

The process of need satisfaction theory can be identified through the following three steps:

1. Need Development

The initial phase of this theory emphasizes on generating the need for the product. The salesperson interacts with the prospects to take feedback about their contentment with the former products along with proactive enquiry of their present needs and requirements.

During this step the salesperson will probe the prospects and actively listen to them. Examples of probing questions include: -

- a. What do you do when you have an epidemic in this area, Doctor?

- b. Tell me Doctor what has been your experience in using our firm drugs?

These probing questions help the prospect to get over their anxieties, concerns, tensions and allows the salesperson to collect information which they may not be able to get to know otherwise.

The salesperson has to listen patiently while the prospect is revealing such potential information of his/her needs which may ultimately result in selling the product. The attention paid by the sales person also reassures the prospect that the salesperson is not selfish and is interested in detailing the product in a way that will benefit the prospect.

2. Need Identification

In the next step, the salesperson sums up the information collected in the development stage and thoroughly analyzes the needs of the prospect. Then he/she confirms this requirement with the buyer, to ensure complete understanding and clarification.

An alert salesperson will be able to identify the prospect as needed even before the latter does. But an effective salesperson knows only when the prospect identifies the needs will they be able to understand better benefits offered by the salesperson. In the need identification stage the salesperson probes and sums up what the potential customer has listened to. Summing up and giving feedback to the prospect is important as it ensures a mutual understanding of the needs.

3. Need Satisfaction

The last stage is all about meeting the buyer's needs appropriately. The salesperson prepares a complete presentation on the product offering and its features which have the potential of meeting the identified needs and wants of the prospect.

The salesperson also exhibits his/her interpersonal skills by resolving the queries and doubts of the buyer. Thus, finally convincing him/her to purchase the product..¹⁸

¹⁸ "Need satisfaction theory of selling - CiteMan." 6 Mar. 2006,
<https://www.citeman.com/244-need-satisfaction-theory-of-selling.html>. Accessed 6 Jan. 2021.



Learning Activity

Outline a summary for the 3 stages of The Need Satisfaction Theory

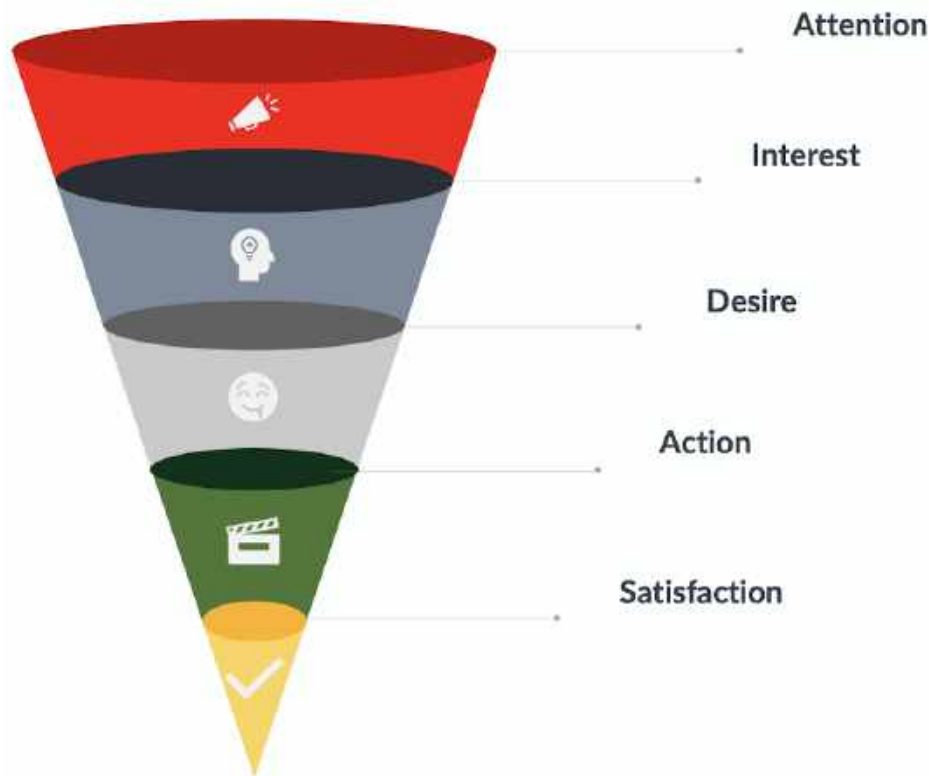
Stages	Summary
Needs Development	
Needs Identification	
Needs Satisfaction	



My notes on The Needs Satisfaction Theory

AIDAS Theory of Selling

The AIDAS theory of selling is one of the most widely known and the basis for training materials in many organisations. AIDAS implies Attention, Interests, Desire, Action, and Satisfaction. The AIDAS theory of selling just states that five different stages of the prospective customer to go through and finally respond to our product satisfactorily. Thus, all five stages should be conducted efficiently.



1. Attention

Gaining attention is a skill, which can be developed with practice, just like any other skill. The phrase “First impression is the last impression” is applicable here. The salesperson’s initial attempt should be to make the customer completely happy. Casual discussion is one of the best openers for the seller to gain customer attention by bringing it to the sale. The

aim here is to put the prospect in the right frame of mind to continue sales talk. In order to participate in the face-to-face interview, the seller needs to convince the prospective customer. A good start to a discussion can provide the stage for a full sales presentation. In order to make the prospective customers aware of their sales presentation a seller must apply his social and psychological skills.

2. Interest Creating

Once you have gained attention, it is very important to maintain interest. Some salespeople are very good in the opening but as the technicalities take over, they become uncomfortable while explaining the product. Whereas others who are strong in the product department might open bluntly but create interest in the second stage. Maintaining interest is a crucial part of the sales process. The seller must be passionate about the product in order to do this. Another approach is to give the product over and allow the prospect to handle it. The same intent applies to brochures and other visual aids.

3. Desire

After attention is paid and awareness is generated, a strong desire for the product must be evoked. At this point, complaints from the future will have to be dealt with carefully. You save time and improve the chances of a sale if complaints were expected and addressed before the prospect raised. The seller in personal sales must do the same. In the mind of the consumer, he must generate enough desire to buy the product immediately. Think of a salesperson selling a tool or a mop. Sales Person explained the benefits of the product and made you think, “Why have not purchased it before?” In this way, this impulse becomes an integral part of the philosophy of AIDAS sales. This is the third step in AIDAS Theory of Selling.

4. Action

Although there may be desire for the product, the customer might not act on it. They might want to buy the product but they might NOT buy it. In such cases the customer needs to be induced. There are various ways to induce the customer to help ensure they buy the product. It is important for the salesperson to understand whether to directly induce the customer or whether to push subtle reminders that you are there for a sales call. Both methods work, but you need to know your customer.

5. Satisfaction

Satisfaction is the 5th step in AIDAS Theory of Selling. The customer has just parted with their money. Just like you part your money and expect good service, they expect the same too. So even after they have bought the product, you need to reassure the customer that they have made the right decision. The product is good for the customer and you only presented the product. It was their decision and they are right about it. These small cues post the sales process really give confidence to the customer and they then look forward to your product rather than thinking whether or not they have made the right decision..¹⁹

¹⁹ "AIDAS Theory of Selling - Projects4MBA." <https://www.projects4mba.com/aidas-theory-selling/680/>. Accessed 6 Jan. 2021.



Learning Activity

For each category below list 3 ways in which you could ensure that a prospect's mind passes through each mental state when selling and securing repeat business;

Attention	
Interest	
Desire	
Action	
Satisfaction	



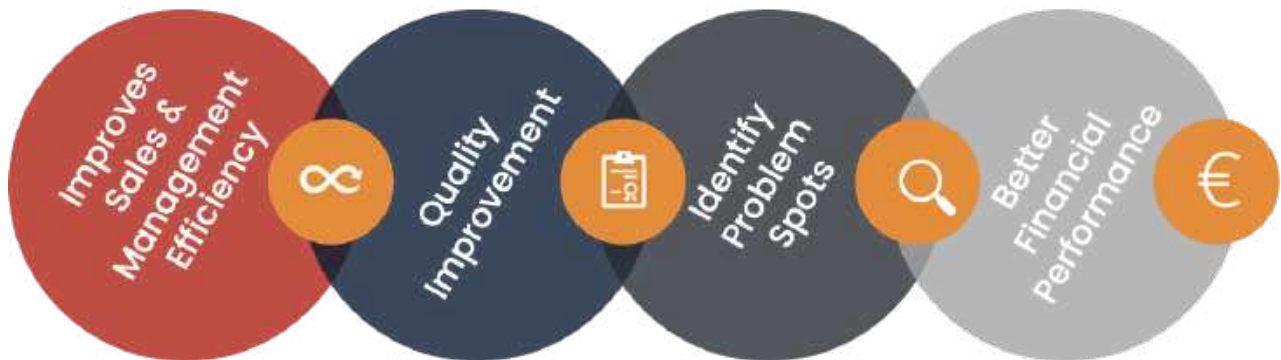
My notes on AIDAS Theory of Selling

A large empty rectangular box intended for taking notes on the AIDAS Theory of Selling.

7 Step Consultative Selling Process

A strong foundation is key for any successful salesperson and sales business. This will undoubtedly include well-defined sales processes. Here are just a few of the many ways you can benefit from having a streamlined sales process in place

Benefits of a sales process



- **Improves Sales and Management Efficiency**

- Efficiency is one of the main benefits of creating a process for any consistently performed set of activities.
- You take out the uncertainty, guesswork and wasted indecision for team members when the next step in the selling process is always spelled out for them.
- As a manager, you can also lead and develop more efficiently with a defined sales process.
- Set evaluative criteria at each stage of the selling cycle, beginning with lead generation.
- Reinforce positive achievements at certain stages when conducting opportunities reviews, and point to specific scenes where shortfalls exist.
- Your development is more objective, efficient and on-point.

- **Quality Improvement**

- When a person performs any task repetitively, his or her tendency is to get better at it.
- By having your team members execute the same selling steps each time, they gain experience performing those steps. In addition to your coaching at specific stages, reps learn from the trial and error of completing tasks over and over again.
- In lead generation, for instance, you and your reps may realise that particular methods of contacting prospects more efficiently contribute to landing appointments.

- **Identify Problems Spots**

- With an undefined process, it's hard to determine the bottlenecks or problem spots for your team.
- With a consistently applied process, you are more likely to find these phases that give your team trouble.
- If one or more team members struggle to address buyer concerns and convert sales efficiently, you can focus training on these areas.
- It is also easier to hold reps accountable for particular tasks with a defined process. Some reps might not like inputting data into your CRM software, for instance. We all know that the CRM system is only as good as the data within it.
- With a defined process, it is easier to recognise an issue like this, ensure everyone understands the reasons for having good data, and if necessary, hold reps accountable for contributing as expected.

- **Better Financial Performance**

- If effectively applied and managed, a defined selling process drives better financial results as well.

- As team members improve at each phase of the sales cycle, their effectiveness and waste-reduction lead to higher revenue and greater margins.
- Additionally, consistency allows you to fine-tune forecasting for improved accuracy.
- Accurate forecasts enable you to set better individual and team quotas and objectives.
- Also, expense budgets are tied to sales forecasts. With improved accuracy, you guard against spending too much or too little on activities and materials that support the sales effort

The 7 Steps

- **Step 1. Prospecting**

The first of the seven steps in the sales process is prospecting. In this stage, you find potential customers and determine whether they have a need for your product or service—and whether they can afford what you offer. Evaluating whether the customers need your product or service and can afford it is known as qualifying.

Keep in mind that, in modern sales, it's not enough to find one prospect at a company: There are an average of 6.8 customer stakeholders involved in a typical purchase, so you'll want to practice multi-threading, or connecting with multiple decision-makers on the purchasing side.

- **Step 2. Preparation**

The second stage has you in preparation for initial contact with a potential customer, researching the market and collecting all relevant information regarding your product or service. At this point, you develop your sales presentation and tailor it to your potential client's particular needs.

- **Step 3. Approach**

In the approach stage, you make first contact with your client. Sometimes this is a face-to-face meeting, sometimes it's over the phone. There are three common approach methods.

- **Premium approach:** Presenting your potential client with a gift at the beginning of your interaction
- **Question approach:** Asking a question to get the prospect interested
- **Product approach:** Giving the prospect a sample or a free trial to review and evaluate your service

Dive deeper into the various sales approaches you can use to start a relationship off on the right foot.

- **Step 4. Presentation**

In the presentation phase, you actively demonstrate how your product or service meets the needs of your potential customer. The word presentation implies using PowerPoint and giving a “salesy” spiel, but it doesn’t always have to be that way—you should actively listen to your customer’s needs and then act and react accordingly.

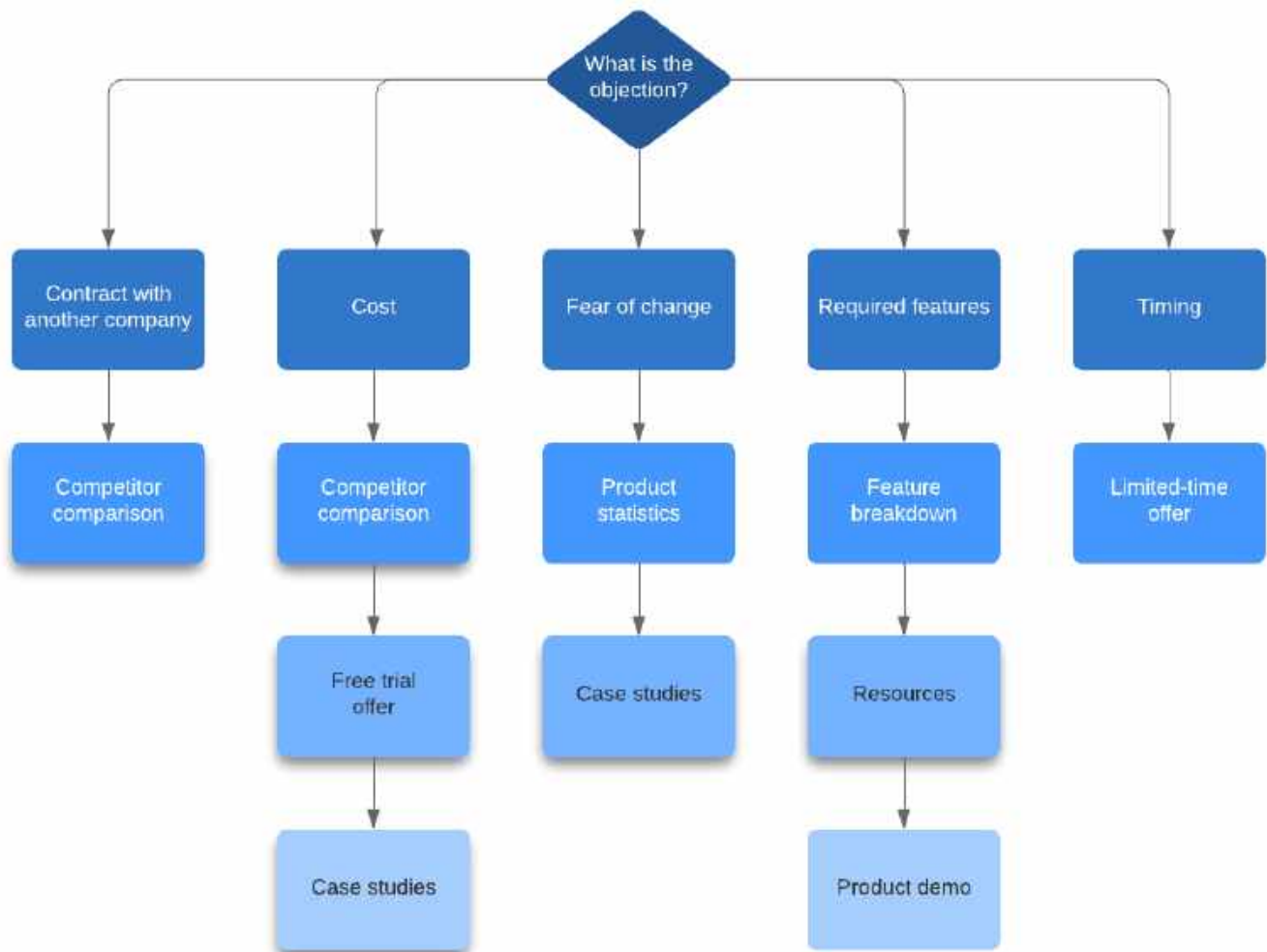
- **Step 5. Handling objections**

Perhaps the most underrated of the seven steps of a sales process is handling objections. This is where you listen to your prospect’s concerns and address them. It’s also where many unsuccessful salespeople drop out of the process: -

- 44% of salespeople abandoning pursuit after one rejection
- 22% after two rejections
- 14% after three
- 12% after four

even though 80% of sales require at least five follow-ups to convert.

Successfully handling objections and alleviating concerns separates good salespeople from bad and great from good. Use this flowchart to map out objections and link to relevant collateral.



- **Step 6. Closing**

In the closing stage, you get the decision from the client to move forward. Depending on your business, you might try one of these three closing techniques.

- **Alternative choice close:** Assuming the sale and offering the prospect a choice, where both options close the sale—for example, “Will you be paying the whole fee up front or in installments?” or “Will that be cash or charge?”
- **Extra inducement close:** Offering something extra to get the prospect to close, such as a free month of service or a discount
- **Standing room only close:** Creating urgency by expressing that time is of the essence - for example, “The price will be going up after this month” or “We only have six spots left”

- **Step 7. Follow-up**

Once you have closed the sale, your job is not done. The follow-up stage keeps you in contact with customers you have closed, not only for potential repeat business but for referrals as well. And since retaining current customers is six to seven times less costly than acquiring new ones, maintaining relationships is key.

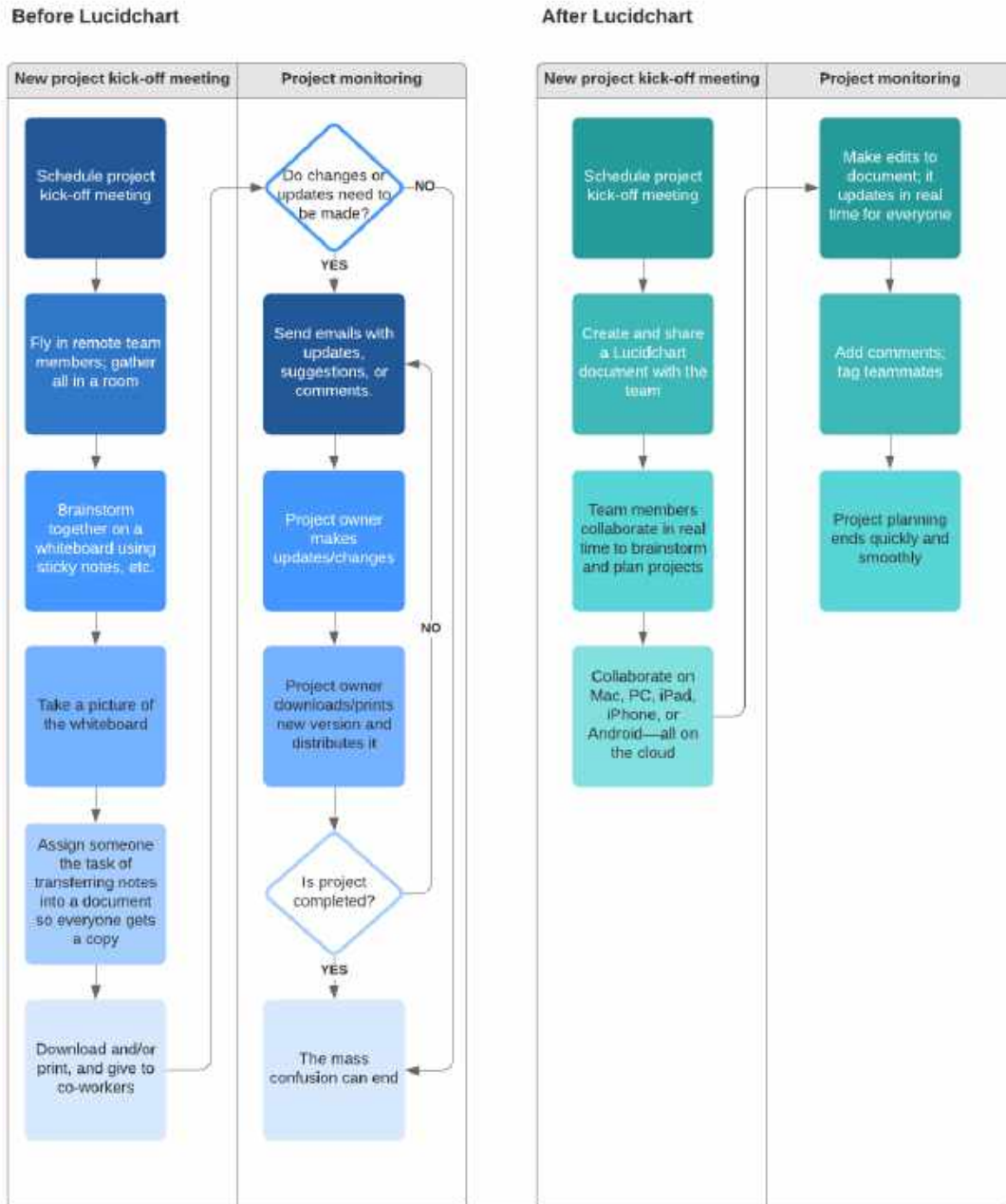
This process can be customised for your particular business/product/service and you may cut out steps that are unnecessary and focus on your customer.

Identifying the customer’s problem

Anyone with a problem related to your area of expertise can be a potential customer. You'll need to dive deep into discovery work to learn each buyer's specific goals, needs, and pain points.

Once you have found problems for your products to solve, it's time to tailor your offerings to fix those issues - and be prepared to explain how your product truly is a solution for the given problems. Sales engineers can use Lucidchart to visually demonstrate how your product or service solves client problems and makes their lives easier, such as the flowchart below.

Once you've tried out a few different approaches, tweaking the original seven steps in the sales process to fit your customers better, you should document your new procedures so that you can follow the steps that work best and easily get new reps up to speed as they are onboarded.



Being persistent

Following up isn't just for after the close to get repeat business. As stated before, most customers don't buy right away. You have to handle objections and try, try, try again. This is where the seven-step sales process doesn't account for repeated approaches, presentations, meetings, or phone calls where you handle objections. If it did, it might be a 13-step sales process or a 21-step sales process.

It's a good idea to stay connected - set up a calendar for repeated contact with potential, present, and past customers.²⁰

²⁰ "What Is the 7-Step Sales Process? | Lucidchart Blog."
<https://www.lucidchart.com/blog/what-is-the-7-step-sales-process>. Accessed 7 Jan. 2021.



Learning Activity

Explain how a salesperson would customise their approach to two customers: a busy, high-powered executive and a friendly, conversational small business owner



Learning Activity

Briefly outline what is involved in each step of developing great content for your presentation/pitch;

Analysing your Audience	Gathering Relevant Information	Converting Information to an outline



My notes on The 7 Step Consultative Selling Process

Knowing Your Customer

Identifying Target Markets

No matter how broadly appealing you think your product or service is, not everyone will need or want to buy it. And gearing your marketing efforts toward the overall market (be it the consumer, industrial, or reseller market) can waste time and money. To maximise your reach and profits, you may want to consider a targeted marketing approach where you identify a smaller target market from the overall market and focus your efforts on that market.

Target market identification broadly involves identifying why a customer would want to buy from you, breaking down the overall market into different market segments based on shared characteristics, and then choosing the most feasible, profitable market segment or segments as the target market for your business/product/service.¹

For example, let's say you run a local luxury men's formal wear shop. Your customer isn't the entire consumer market or even every man. Rather, you might divide the overall market into segments based on geographic, demographic, and psychographic characteristics, focusing on high-income men who are within a 10-mile radius, between the age of 25 and 50, and desire status. You can then focus your marketing mix on that target market to better reach the men who actually need or want your products.

Target marketing vs mass marketing

The difference between targeted and mass marketing is that mass marketing tries to reach as many people as possible, while targeted marketing attempts to reach a specifically defined and profiled audience. Both of these methods can be an effective route to market and can drive leads and sales for a business.

Mass marketing can be more expensive, the message must be stated in the most basic form to have the broadest appeal possible and the result can become diluted. In the digital age, people expect to be spoken to on a personal level and a blanket mass marketing campaign could prove a costly exercise if not executed properly. One example of mass marketing could be a direct mail door drop to a local area for a new restaurant opening in the area. They would blanket an entire catchment area and some of those residents would be potential clients for them, simply down to

the postcode. Aside from the address, it's not targeted but it could generate some results for the restaurant.²¹

Benefits of Target Market Identification

The advantages of identifying a target market include:

- More effective marketing mix: If you know who your customers are, you can tailor the product, price, and distribution channels to better meet their needs and desires.
- Helps you choose the right marketing channels: With a target market in mind, you can promote your products or services to customers where they are, be it by posting on a given social media platform or placing ads in a part of town where people in your target market regularly frequent.
- Uses limited time, money, and resources more efficiently: Promoting to a narrower target market as opposed to the overall market allows you to allocate your hours and dollars more efficiently on the people who are most likely to need or want to buy from you.
- Maximises sales and profits: All of the above factors can boost the appeal and reach of your marketing mix, which can boost the volume of sales and improve your bottom line.

How to Carry Out Target Market Identification

Follow these steps for the identification of the target market:

1. Assess product or service characteristics

Make a list of the features as well as the benefits that come with your product or service. For example, a laundry detergent might feature a color-safe stain-removal formula, with the benefit being cleaner clothes that retain their bright color.

2. Identify why customers would buy from you

From the features and benefits you listed, identify the key selling point that gives customers a reason to buy your product or service.

²¹ "Targeted Marketing vs Mass Marketing | Trident." 19 Mar. 2020, <https://www.wearetrident.co.uk/targeted-marketing-vs-mass-marketing/>. Accessed 7 Jan. 2021.

3. Identify the most relevant dimensions of segmentation

Figure out the dimensions along which you want to break down or segment the larger overall market into a smaller target market. To do so, make a list of the major segmentation bases and decide which are relevant to the majority of your potential customers.

Major segmentation bases include

- geographic (customers are targeted locally, statewide, regionally, or nationally),
- demographic (customers are targeted by their age, gender, race, income, and education level, for example),
- psychographic (identification based on attitudes, beliefs, emotions, lifestyle, and hobbies)
- behavioral (identification based on various patterns such as purchasing occasion and loyalty status).

4. Segment the market according to specific criteria

Identify one or more specific segments that will define the target market. For example, a men's and women's shoe retailer that chooses to segment the market by the demographic characteristics of gender and the psychographic characteristic of hobbies may decide to target men who enjoy running in their performance running shoe campaign and women who play tennis for their tennis shoe campaign.

5. Choose the most profitable segments to include in the target market

Evaluate how worthwhile it would be to pursue each identified market segment by evaluating your firm's financial resources and the profitability of each segment, which segments your competitors serve, and how established you are in the market. If you can't afford to promote to all the identified segments (or it wouldn't be lucrative to do so), there's too much competition for a given segment, or you're trying to break into a new market, you may want your target market to focus on one segment.²²

²² "Target Market Identification: What Is It?."

<https://www.thebalancesmb.com/what-is-target-market-identification-2295569>. Accessed 7 Jan. 2021.



My notes on Identifying Target Markets

Identifying Customer Needs

Customer needs are the named and unnamed needs your customer has when they come in contact with your business, your competitors, or when they search for the solutions you provide.

Types of Customer Needs are;

- **Functional Need (easy to recognise)**

For example, a customer who's planting a garden for the first time might say, "I need a garden hose." Meanwhile, an experienced gardener might tailor their criteria by saying, "I need a hose that's long enough to reach my vegetable garden from my backyard tap." Another customer who's dealt with the frustration of using a low-quality product might tailor their need differently by saying, "I need a high-quality garden hose that won't tear or kink from regular use."

With this kind of insight into customers' functional needs, a company that manufactures garden hoses might develop new products, such as hoses that come in a range of lengths and don't kink. Identifying a pain - Nobody buys until there is a need.....What are the pains in the company which would require your product/service to relieve them?

- **Social Need (can go unrecognised)**

Returning to the garden hose example, imagine the customer is a member of a gardening association. Members of this association have an affinity for high-tech gardening tools and regularly discuss new products they've tried. The customer may decide, either consciously or unconsciously, to purchase a hose with advanced features—for example, one that connects to a smart water controller—to bond with other association members. If, on the other hand, the customer is an environmentalist who's active in various communities, they might be more concerned about whether a hose is made from sustainable materials that their fellow environmentalists use

- **Emotional Needs (can go unrecognised)**

Returning once more to the garden hose example, consider the reasons why the customer gardens. If they find gardening to be a relaxing hobby, they may be more likely to choose a basic hose over a high-tech option. Alternatively, if gardening triggers memories of the customer's grandparents, they might opt for a brand that evokes that nostalgia.

Other types of customer needs are;

- Price - The item is affordable and appropriately priced for the quality
- Convenience - Saves time and effort
- Image and status (as in an item of clothing or technology) - Looks good, impresses others, makes the customer feel good about themselves
- Durability and lifespan - Built to last, dependable, and won't break
- Packaging type - Resealable, refillable, recyclable, or all of the above
- Support and aftercare - Customer knows they can get questions answered and problems solved
- Effectiveness - Gets the job done

What is a customer needs analysis?

A Customer Needs Analysis is the process of identifying a customer's requirement for a product or service. It is used in all kinds of contexts such as, brand/concept development, product/service development, analysing value and much more.

Firstly, it helps with product development and product packaging decisions. If you know your customers want a range of color and size options in a given product, you can make sure you provide them. If they want a range of colors and sizes but it matters more to them to get your product at the right price, then you know how to prioritise your resources to balance those needs correctly. You can also use customer needs assessments around existing products and services to enhance and develop your product offering in the future.

Secondly - marketing message reflects - For example, if you're selling outdoor gear, as well as mentioning that it's durable and waterproof, you could highlight the fact that your sustainable manufacturing methods result in a zero-carbon outcome for every garment. Thanks to your customer needs analysis, you'll know if that's something your nature-loving customers really value.

How to capture customer needs

- Customer surveys
- Focus Groups
- Customer Journey Mapping
- Historical sales data - buying trends
- Understanding the psychology behind buying/consumption
- Social Media/digital insights
- Mystery shopper



Learning Activity

What type of customer needs do you identify regularly within your business and why do you think this is the case? (If you are not currently working then reflect on an organisation you are familiar with.)



My notes on Identifying Customer Needs

Customer Behavioural Theories

Buyer Behaviour refers to the decision and acts people undertake to buy products or services

- Understanding why and how people decide to purchase
- Understanding why they can be so loyal to particular brands
- Buyer behaviours can be the driving force behind your marketing endeavors

4 Types of Buyer Behaviour

Complex Buying Behaviour	Dissonance Reducing Buyer Behaviour
Habitual Buying Behaviour	Variety Seeking Buying Behaviour

- **Complex Buying Behaviour**

Typically the consumer does not know much about the product category and has much to learn. For example, a person buying a personal computer may not know what attribute to look for. Many of the product features like “16K memory” “disc storage”, “screen resolution” carry no meaning to them.

This buyer will pass through a learning process characterised by first developing beliefs about the product, then attitudes, and then making a thoughtful purchase choice. The marketer of a high-involvement product must understand the information-gathering and evaluation behaviour of high-involvement consumers.

The marketer needs to develop strategies that assist the buyer in learning about the attributes of the product class, their relative importance, and the high standing of the company's brand on the more important attributes. The marketer needs to differentiate the brand's features, use mainly print media and long copy to describe the brand's benefits, and motivate store sales personnel and the buyer's acquaintances to influence the final brand choice

- **Dissonance Reducing Buyer Behaviour**

Similar to Complex Buying Behaviour this type of behaviour includes lots of involvement in the buying process due to high price or infrequent purchase. Buyers here find it difficult to choose between brands and are afraid that they will regret it and change their minds after purchase. Usually they will purchase quickly, primarily based on good price or purchase convenience. They act first and acquire beliefs and attitudes afterwards, therefore after purchase they can experience dissonance, for example, hearing favourable things about another brand.

For example a consumer purchasing car insurance may shop around for the best price which can be time consuming, go with the best price at that time but later hear of an offer elsewhere.

- **Habitual Buying Behaviour**

This type of buyer has low involvement in a purchase decision. They see no significant difference between brands and buy habitual goods over a long period. Consumers do not search extensively for information about the brands, evaluate their characteristics, and make a weighty decision on which brand to buy, they purchase brands because they are familiar with them, not because they are loyal.

Marketers of low-involvement products with few brand differences find it effective to use price and sales promotions to stimulate product trials, since buyers are not highly committed to any brand. In advertising a low-involvement product, a number of things should be observed. The ad copy should stress only a few key points. Visual symbols and Imagery are important because they can easily be remembered and associated with the brand.

The ad campaigns should go for high repetition with short-duration messages. Television is more effective than print media because it is a low-involvement medium that is suitable for passive learning. Advertising planning should be based on classical conditioning theory

where the buyer learns to identify a certain product by a symbol that is repeatedly attached to it.

One of the simplest examples of habitual buying is purchase of goods of daily needs. The purchase of milk or bread in the nearby store is the example of habitual buying behavior.

- **Variety seeking buying behaviour**

This type of buyer switches between brands for the sake of variety and curiosity, not dissatisfaction.

The marketing strategy is different for the market leader and the minor brands in this product category. The market leader will try to encourage habitual buying behavior by dominating the shelf space, avoiding out-of-stock conditions, and sponsoring frequent reminder advertising. Challenger firms will encourage variety seeking by offering lower prices, deals, coupons, free samples and advertising that presents reasons for trying something new. These points are linked to habitual low buying involvement buyers.

For example, a consumer likes to buy a cookie and choose a brand without putting much thought to it. Next time, the same consumer might choose a different brand out of a wish for a different taste. Brand switching occurs often and without intention.

Psychological Triggers to win sales

Sales psychology is a type of process that involves considering the psyche of your target market to sell products and services. If you understand the values of your target audience, strategies can be used to show how the product (or service) stays in line with those values.

- **Reciprocity**

The principle of reciprocity in sales psychology means that when someone gives us something, we feel compelled to give something back in return. Have you ever gone to Costco and ended up with an unplanned sausage purchase because you felt an obligation to buy after you tried a free sample? That was the principle of reciprocity in action. Of course, online retailers can't personally visit the house of each person who interacts with them to shove a sample in their hand.

- **Commitment and Consistency**

As it relates to the psychology of selling, the principle of commitment and consistency says that people will go to great lengths to appear consistent in their words and actions, even to the extent of doing things that are basically irrational. That's why if you're trying to make a change in your life (losing weight, for example) it can be very helpful to share your goal. Once you've committed publicly, you'll have much more incentive to keep up your end of the bargain.

As a retailer, if you can understand the psychology of buying and get customers to make a small commitment to your brand—like signing up for your email newsletter, they're more likely to eventually purchase from you. And if you can actually get products in their hand, even if there's no official commitment to buy them, your chances increase even more. You can make it easy to commit by creating easy returns policies

- **Liking**

The principle of liking as it pertains to the psychology of buying says we're more likely to say yes to a request if we feel a connection to the person making it. That's why the associate handing out sausage samples at Tesco/Centra usually has a smile. It's also why brands hire celebrities to endorse their products: so that people will transfer their love of Roger Federer to the watches he's endorsing. They partner with celebrities to create lines for their brand. Fans of the celebs become fans of the sunglasses. There are lots of ways to make this principle work for your product: Using relatable models is good for clothing brands also - this does not mean supermodels, just real models they can relate to. Sales storytelling is a good tactic here as you are telling relatable stories that resonates more with the customer

- **Authority**

Associating your brand with authoritative figures, thus inheriting your own sense of authority. A stamp of approval from an expert in your industry could provide just the authority you need to instill customer confidence and persuade browsers to buy.

Remember when Oprah endorsed Weight Watchers and shared her success story? She was convincing because she had first-hand experience with the products and the results. Weight Watchers even created a dedicated page on their website to share her story and expertise, which helped to establish their authority on the topic. Similar to liking with celeb endorsement but this is different as it is a celebrity trying and testing a product to make it

credible rather than Roger Federer endorsing a watch that people just buy because they like him

- **Social Proof**

Social proof is connected to the principle of liking: Because we're social creatures, we tend to bias toward things other people already like, whether we know them or not. Anything that shows the popularity of your site and your products can be a psychological trigger. According to Nielsen, 83% of consumers trust product recommendations from their friends and family, which is way more credible than anything you can say about yourself. Social proof psychology can also happen off your website, such as on social media. Influencer marketing has become commonplace in ecommerce. Those online comments about your brand and products could generate interest and, in turn, sales. In studying the motivations and psychology of buying

- **Scarcity**

People are motivated by the thought that they might miss out on an opportunity. Call it the Eternal Teenager Principle: If someone tells you that you can't have it, you may want it even more. Announcing scarcity only gets you half of the way there, however. You need to give your audience enough information to act on the opportunity. A simple "we only have 10 left!" message and no obvious path to purchase the product would do a disservice to your message and cause needless frustration. Examples include - sales that are ending, out of stock announcements, seasonal or limited products

- **Unity**

The principle of unity is based on the idea of shared identities. Your brand and your customers may have shared ideas or values, but unity takes it a step further with identities, or groups. Identities are based upon those commonalities. Let's take a scenario: You might be a brand that sells outdoor gear to customers who love spending time outside. When you apply the unity principle, you're identifying with groups of outdoors lovers. Patagonia is a prime example of a brand that has done this. They've self-identified not only as lovers of the outdoors, but as activists who are fighting to preserve the outdoors. This has encouraged groups of customers who share that identify to have fierce loyalty to the brand. Justin Bieber fans (beliebers) are an example of using unity in sales - by creating a label for this united fanbase



My notes on Customer Behavioural Theories

Understanding Varying Customer Personalities

There's a subtle, debilitating disease that affects almost everyone in sales. It can go unnoticed for weeks, months, or even years.

"Autopilot sales mode": Doing the same tasks day after day leads to autopilot, or the tendency to act without conscious thought.

For example, many salespeople have outgoing, talkative, emotional, enthusiastic personalities. And they sell in a way that feels most "natural" to them. Every time they get on a call, they sell in a way that they would like to be sold to without thinking twice about it. Most salespeople don't think about why they're saying what they're saying.

An outgoing, emotional personality is great when you're selling to a decision maker who also has that personality. But what if your customers are more reserved or analytical? What if they're less willing to take risks or are less optimistic? In situations like this, going on "autopilot sales mode" can cripple your close rate.

The best salespeople modify their script to their audience members based on their personality. They understand the same tone and delivery style won't always work for two different customers. They know different types of customers need different buying experiences.

One framework you can use to adapt yourself to your audience is the taking a sales-based DISC personality assessment. By understanding which DISC archetype most closely matches you and your prospect, you'll know which strategy and presentation style to use.

Identify DISC Type

DISC is broken down into four archetypes: Dominance, Influence, Steadiness, and Compliance.

- **"Dominant"** (D) people prioritise results over everything else. They care most about their bottom line and are very direct in their communication.
- **"Influential"** (I) people care most about influencing or persuading others. They put a lot of weight on their relationships.
- **"Steady"** (S) people emphasise security. They look for sincerity and dependability over anything else.

- **“Compliant”** (C) people want as much information as possible about your product or service. They value quality and accuracy and are afraid of making the wrong move.

Aside from taking a DISC assessment test, you can figure out your own profile by thinking about your behavior in different situations. For example:

- Dominant people are highly driven and ambitious, with anger being their driving emotion. They’re also extroverted, task-oriented, and occasionally impatient.
- Influential people aren’t afraid of being the center of attention. If you’re the Influential type, you’re probably enthusiastic about what you do, talkative, and extroverted.
- Steady people are frequently reserved or non-emotional. These people crave security, are resistant to change, and prefer working on one or two tasks instead of several.
- Compliant people are very accurate, precise, and detail-oriented. They’re naturally cautious and rely on calculated data-backed decisions rather than gut feelings.

Once you figure out your own DISC profile, you’ll have a good sense of your strengths and weaknesses when it comes to selling to other personality types. Most salespeople naturally sell to their own personality type instead of thinking about the personality of their customers.

For example, if you have a high “D” personality, you might become impatient with someone who’s an “S” who prefers to take an interaction more slowly. If you’re an “S” selling to a “D”, you might get turned off by their direct and confrontational approach.

If you’re an “I” and you’re selling to a potential customer who’s a “C,” you might try to sell to their emotions or feelings when they want facts and data.

Here are some behavioral and body language clues you can use to quickly figure out the personality of your customers:

- High “D” people typically move fast and are always on the go. They’ll talk with their hands, using big gestures. They’re not enthusiastic about small talk. Sometimes, they can give the impression that they’re rude or hard to deal with.
- High “I” people are typically trusting and optimistic. They use lots of facial expressions and hand gestures while they talk.

- High “S” people tend to keep “poker” faces and don’t display much emotion. They’ll talk and walk at a steady, easy pace.
- High “C” people will ask direct, detailed questions. Their classic body language is having their arms folded, with a hand on their chin.



Learning Activity

Try for yourself and complete a DISC profile and figure out what your personality type is.

Sometimes it may be difficult to decide which description to select. Remember there are no right or wrong answers in this DISC personality test, so just make the best decision you can.



Select one thumb up

and one thumb down



in each box.

<https://www.123test.com/disc-personality-test/>

The results of the DISC profile told me;

You can figure out the main personality type of your potential customers within the first few minutes of an interaction based on how they respond to small talk, the first questions they ask you, and their body language.

Adapt Your Selling Style to Your Buyer's DISC Type

Once you're aware of your personality type and know how to identify the personality types of your customers, you can adapt your sales techniques to resonate with them.

Here are some tactical ideas on how to do that for each personality type:

- **Dominant**

If you're selling to a high "D" customer, show you respect their views and requirements without making them feel like you're simply agreeing to whatever they say. They'll view that as a sign of weakness.

You should also avoid focusing on them personally, and stick to the facts at hand.

Dominant people are strongly influenced by other people who they perceive as having high status or power. When possible, use testimonials from well-known people in your industry.

- **Influential**

"I" personalities like to talk about their ideas and emotions, so ask them what they're thinking and feeling. Let them vocalise what's working and what's not.

They can also be disorganised and avoid details, so providing summaries or takeaways of what you discussed can help them focus on what you want them to focus on. But only include details that are absolutely necessary.

- **Steadiness**

People with high "S" personalities are even-tempered, composed, and good at listening. Show them you're interested in who they are as a person, and don't let your sales pitch feel too "transactional." Make it clear you value the relationship.

If you focus too much on facts and numbers, you'll risk coming off as impersonal.

- **Compliant**

People with high “C” personalities like having as much information as possible. Give them the information from your verbal pitch again in writing. Knowing they can review all the documents later and make an informed decision puts “C” people at ease.

Having a detailed pros and cons list in your proposal can also help them make a decision.

Compliant people are very afraid of making the wrong decision, so offering some type of guarantee or refund can help ease their worry.

Many salespeople sell in a way that feels most “natural” to them, which usually means selling to their own personality type. That’s why most pitches tend to have inconsistent results.

If you’re able to adapt your pitch on the fly to the personality of your customer, you’ll consistently exceed your quota.



My notes on Understanding Varying Customer Personalities

Measuring for Success

Goals and Targets

Working towards a goal is something we thrive on as human beings, whether it's setting ourselves targets in our professional lives, or having ambitions on a personal level.

Effective goal setting is a great habit to develop and will be essential if you want to achieve big things in the world of sales. The reason is simple – focus. If you have a goal and know where you're trying to reach, you can focus all your efforts on finding the best and most efficient route to get there. Without a clear destination, you risk rambling along, wasting time and missing opportunities.

But it takes skill to set productive goals and chasing the wrong ones could cost you dearly (not just in lost sales).

To get it right, you need to have a good understanding of the following:

- How your business processes run
- What the wider business goals are
- How best to align your sales targets with the business goals
- What you need to do to achieve these targets
- How you can measure your progress and improve on what you're doing

Understanding where you are now

It's important to know what your starting point is. Are things running and you simply wish to crank up the heat and accelerate your results? Or is your sales machine stuttering along, not sure what it's doing, when or how?

Start by mapping out the whole process. List all the variables, including the people involved, your products and services, lead generation, sales pipeline, tools, etc.

Even just doing this can often be an eye opener. By listing out all the pieces of the puzzle, you can start to get a clearer picture of where improvements could be made. To take it a step further, rate all the different parts based on what's working, what's not and how well they are doing.

Why are some things working and other things not?

If you have a target, for example to increase turnover, then it's a big mistake to just assume "we need to add more leads to the process to get more sales out". You firstly need to understand what's going on and whether that statement is true.

It could be that you are getting enough leads in, but your qualification process needs more work. Or it may be that more training is needed when it comes to closing deals.

It won't always be an easy task to decipher the problem, as there are likely to be many variables at play. The best way to approach it is to talk with the people directly involved. They will usually have a better sense about what's going on and why.²³

6 Steps to Achieving Sales Goals

Here's a roadmap we suggest you follow:

1. Review your sales goals first thing in the morning every day

Say your big picture goal out loud, scan your plan for the week and review goals and actions for the day. At the end of each day, review how the day went, and set goals and actions for the next day.

2. On Friday or Saturday

Review the week and set goals and actions for the next week.

3. Once per week (this can be at your Friday or Saturday review session)

Review your goals with a goals partner. Your goals partner can be a peer, a mentor, a coach, or a friend, but it needs to be someone you explicitly work with each week to make sure you're on top of your goals, staying committed, and pushing yourself. Along with

²³ "Why is it so important to set sales targets? - Lead Forensics."
<https://www.leadforensics.com/why-is-it-so-important-to-set-sales-targets/>. Accessed 26 Jan. 2021.

goals, milestones, and progress, you should discuss any hassles or potholes that are holding you back so you can fight your way through them.

4. Once per month

Meet with a small group of people you trust to review what you're doing, where you're headed, what you'll do in the next month, and get ideas for how you can achieve more and shake off any nagging hassles that are holding you back.

5. Once per quarter

Review your progress toward your annual goal. Set no more than 3 quarterly priorities that you'll direct all your passion, energy, and intensity toward so you can stay on track to meet your annual targets. During the quarterly meeting, step back and ask yourself, "What do I absolutely, positively need to get done over the next three months to achieve my annual goals?" Define it, commit to it, and set your monthly targets and actions for the next three months.

6. Once per year

Set your targets for the next year. Make sure you ask yourself, "What do I need to do to get to my big picture goal?" When you're done with your goals and plan, ask yourself, "If I get done what I am about to do, will it help me get to my big-picture goal?" Make sure it does before you put your head down for a year and make it happen.²⁴

²⁴ "Your 6-Step Guide to Setting and Achieving Sales Goals."
<https://www.rainsalestraining.com/blog/setting-and-achieving-sales-goals>. Accessed 8 Jan. 2021.



My notes on Goals and Targets

Smart Goal Setting



Figure 3. SMART Goals

As a salesperson, it's important to be SMART about your sales goals. SMART is a well-known industry acronym for sales goals that are Specific, Measurable, Attainable, Realistic and Timely.

- **Specific**

One of the biggest pitfalls in setting sales goals is not being specific enough. Rather than setting a goal to increase sales revenue, establish clear guidelines by attaching a number and timeline to it.

For example, when Apple released its sales goals for the first quarter in the fiscal year of 2018 in a press release, it noted that it wanted to increase revenue to between \$84 billion and \$87 billion while keeping operating expenses between \$7.65 billion and \$7.75 billion.

These concrete numbers were specific to keep the organisation more accountable in pursuing its sales goals.

- **Measurable**

It's hard to measure growth and success without tangible numbers. Use a measurement to outline your sales goals. For example, a goal could be to generate 25 new leads in the next quarter.

Ahlem Mahroua, the founder of beeHYPE Marketing, set the perfect sales goals by noting that she wanted to “add €15K (approximately \$18,000) in billed revenue to our business in the second quarter by acquiring five new clients. To acquire five new clients, we will talk to 50 new leads by attending two networking events per week in Barcelona during April, May, and June.”

- **Attainable**

While it's fantastic to dream, you shouldn't set a goal that's impossible to reach. A goal should be a balance of something you have to work hard for yet is achievable. If you're running or working in a startup, one of your first sales goals could be to land two clients, instead of 20, within your first month of being a business.

- **Realistic**

Similar to being attainable, your sales goals should be realistic. No powerhouse company became a household name overnight. Growth takes time, so don't rush to set impractical goals. Replace the idea of becoming a multimillion-dollar business with the goal of expanding your product or service in six months with three tangible new features your team has developed.

- **Timely**

One of the most important facets of being smart about your sales goals is setting concrete deadlines. Establish a date or firm length of time for each of your goals. This will help your sales team maintain productivity and make it easier to map out your task timeline.

Types of sales goals

There are various types of sales goals to consider. One of the most obvious goals is set around revenue. You can make weekly and monthly goals for how much revenue you should bring in as a

whole – in addition to individual benchmarks. Within your revenue sales goals, you should review components such as margins (profit minus expenses) and efficiency.

When reviewing your existing customer base, you can set goals to manage churn rate, customer satisfaction, and customer lifetime value. For potential customers, you can look at the number of leads the team is working with and set goals for conversion – a “win rate,” per se.

Types of SMART Sales Goals:

- Revenue-the amount of revenue you want to earn or generate as a salesperson
- Margins-overall profit minus expenses
- Efficiency-the ratio of revenue to costs
- Churn Rate-the rate at which you reduce cancellations and increase renewals
- Customer Satisfaction-how happy your customers are with your product or service
- Customer Lifetime Value-customer loyalty over a period of time
- Win Rate-the rate at which sales leads convert into new clients

If you desire to gain new customers, you can set your sights on revenue and improving results. If the company has been around for over a year, you may want to consider changing your goals and focus on retaining customers.

When setting short-term goals, remember to keep your long-term vision in mind. Weekly, monthly and even annual sales goals should align with the overall vision of what you want the startup to be and what kind of impact you want it to have.²⁵

²⁵ "How to Set SMART Sales Goals - Crunchbase." 28 Nov. 2018,
<https://about.crunchbase.com/blog/how-to-set-smart-sales-goals/>. Accessed 26 Jan. 2021.



Learning Activity

Create a SMART Goal, in relation to a professional area you have identified that needs development

Goal	Specific	Measureable	Achievable	Relevant	Time Bound



My notes on SMART Goals

KPI's

A KPI or Key Performance Indicator is a measurement that evaluates the performance of a business activity. It measures the success of a company at reaching its operational and strategic goals on different performance aspects. KPIs can be high-level, monitoring the global performance of a business, or more low-level, focusing on processes' or individual's performance.

No matter which department you are in, KPIs are vital to grasp the status of sales and to make the right decisions.

KPIs help managers gauge the effectiveness of their functions, processes, campaigns and actions. They are essential to ensure you are on track to reach organisational goals. It isn't always easy to find the right performance indicators that will fit your department or activity. The objective is always to determine those that communicate progress in the most meaningful way.

Sales KPIs provide insights on your sales process and success. Tracking the pipeline health, lead generation, general activity and productivity, they are essential to drive sales forward.²⁶

Good KPIs:

- Provide objective evidence of progress towards achieving a desired result
- Measure what is intended to be measured to help inform better decision making
- Offer a comparison that gauges the degree of performance change over time
- Can track efficiency, effectiveness, quality, timeliness, governance, compliance, behaviors, economics, project performance, personnel performance or resource utilisation
- Are balanced between leading and lagging indicators

Every organisation needs both strategic and operational measures, and some typically already exist. Figure 4 depicts strategic, operational and other measures as described below:

²⁶ "KPI Examples - Get 300+ KPI Templates" <https://www.datapine.com/kpi-examples-and-templates/>. Accessed 7 Jan. 2021.

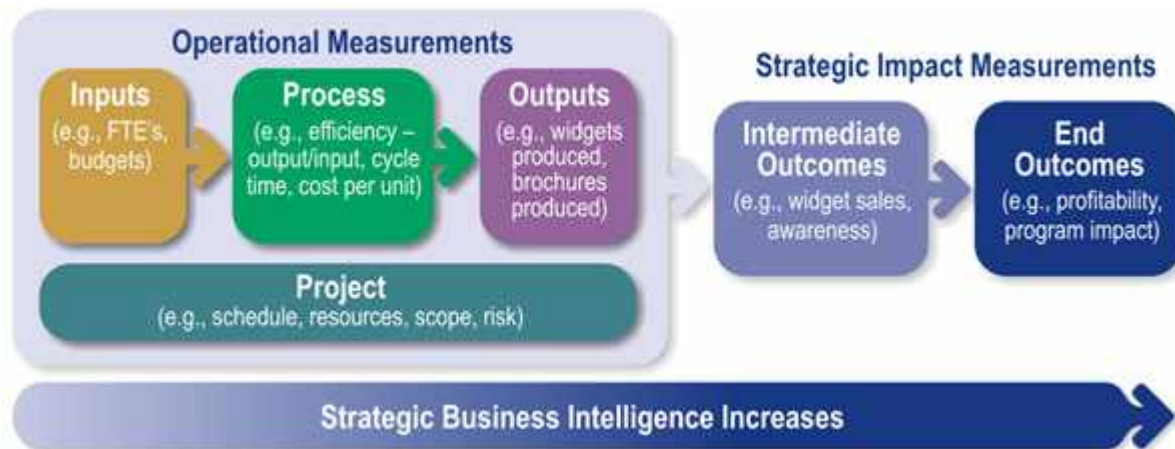


Figure 4 Strategic, operational and other measures for KPI's

- Strategic Measures track progress toward strategic goals, focusing on intended/desired results of the End Outcome or Intermediate Outcome.
- Operational Measures, which are focused on operations and tactics, and designed to inform better decisions around day-to-day product / service delivery or other operational functions.
- Project Measures, which are focused on project progress and effectiveness.
- Risk Measures, which are focused on the risk factors that can threaten our success.
- Employee Measures, which are focused on the human behavior, skills, or performance needed to execute strategy.
- An entire family of measures, including those from each of these categories, can be used to help understand how effectively strategy is being executed²⁷.

²⁷ "What is a Key Performance Indicator - KPI.org." <https://kpi.org/KPI-Basics>. Accessed 3 Feb. 2021.

Common Sales KPIs

These common KPIs are key performance indicators to help you prioritise and track only the most important figures for your sales.

1. Gross/Net Profit Margins
2. Sales revenue
3. Prospecting activity
4. Funnel flow
5. Closing rates
6. Customer retention
7. Year-to-date sales growth



My notes on KPI's

Surpassing Targets and Underachieving

Although sales targets can be set, your performance of targets may fluctuate between surpassing and underachieving at various times of the year, this can be down to public holidays, economic and political factors and influences such as Brexit. It is important for you as a salesperson to try and maintain a steady level of sales targets to ensure a consistent revenue and performance.

Here are five steps to consistently exceed sales targets;

- **Ensure you have a proven sales process**

A sales process is much like a business plan but designed specifically for sales efforts. A well-designed sales process allows you to know the resources available and the results from the use of those resources. Every cause has an effect, know your cause and know your effect.

- **Create measurable Key Performance Indicators**

KPI's are at the heart of every successful sales process but they shouldn't be mindless – just chasing the numbers. By setting measurable KPIs you can see what works and what doesn't within your sales process.

- **Training**

Selling is like any other skill – such as football. Most people are quick to say footballers, like Beckham, are successful because they're talented. But pay attention to this quote by Alex Ferguson, David Beckham's early mentor and coach at Manchester United, "Beckham practiced with a discipline to achieve an accuracy that other players wouldn't care about." Beckham trains six hours a day six days a week. Most salespeople have not read a book on sales or taken a sales course for years – When you can succeed as a salesperson, train others in your team.

- **Align and leverage every activity**

In too many organisations a salesperson gets an order but then is told by production that they cannot deliver or perhaps by accounting that the payment terms are not acceptable or even that by the business owner to sell what we have, not what the customer wants. Imagine what percentage of your customers would never work with you again because

you delivered late or the quality was not to the level promised? Ensure you can deliver before you make a promise.²⁸

What do you do when you notice you're continually missing sales targets?

Take positive steps to get back to meeting or even exceeding your quarterly sales goal.

1. View Bad Months as Character-Building

In sales, everyone's responsible for a number. Whether you missed last quarter's number by a hair, or are lagging behind by a mile, it matters and it's a problem.

When you're in a sales slump, don't waste time on excuses. Instead, use this time to get better, both personally and professionally. Have a particularly rough day at the office? Use it as an exercise in how to not take work frustration home to your family or roommate.

Manager attached at your hip to make sure you don't miss two quarterly quotas in a row? Use this as a time to show them how adaptable and hardworking you are. Once you emerge from your slump, you'll be a stronger salesperson for it -- and you won't have alienated your friends and coworkers.

2. List the Quarter's Wins and Losses

Tally up the wins and losses you experienced last quarter. For example, maybe you closed a high-profile account or won business away from a competitor. Chances are, you did more right than you remember. Obviously you also had some missteps, so be honest about addressing those.

Next, share your list with a close colleague, mentor, or coach and ask for feedback. They'll be able to look at your list and identify areas where they can offer training or advice.

It's also a good idea to dissect the accounts you did close. Did you approach those in a different way? What common characteristics did they share? How did you demonstrate value? Reviewing these closed-won accounts will allow you to think strategically about why they were a success. It's also a great way to remind yourself you have the skills it takes to succeed at your job.

²⁸ "Six Steps to Exceeding Sales Targets - The Sales Experts Ltd." 24 Jul. 2017, <https://www.thesalesexperts.com/six-steps-exceeding-sales-targets/>. Accessed 7 Jan. 2021.

3. Turn to a Mentor

If you don't have a mentor, now is the right time to find one. Ask your boss if they can connect you to anyone internally or externally who might specialise in your sales vertical or region.

Choose someone who's been in the sales profession longer or has a track record of success. They'll be able to offer you an outside, unbiased opinion of your work.

Once you've shared your list of quarterly wins and losses, your mentor can identify some "tells." Together, you can craft a new plan of attack for meeting your goals and becoming a stronger salesperson.

4. Work Smarter and Harder

We often hear "Work smarter, not harder." But when you're not meeting your quota, you've got to do both. While it's important to relax and take care of yourself (more on that below), it's also important to hustle hard.

First, frame your situation using a simple formula like the MINTO Pyramid Principle structure. If you're setting up a plan for meeting your number this quarter, it might look something like this:

Situation: I didn't meet my number last quarter. It's really important I hit my quota this quarter.

Complication: I don't have many opportunities in my pipeline right now.

Question: Can I grow the pipeline and get more leads to convert so that I meet my quarterly quota?

Answer: Yes. I make X number of calls per month. Out of those calls, only Y number of calls turn into demos. Out of those demos, historical data shows that only Z number turn into closed-won business.

Given these numbers, I can use a little simple math to work backward and calculate how many additional phone calls I need to close the right amount of business.

With this framework, you've clearly defined the problem and outlined a data-fueled approach to solving it. Your boss can provide feedback on your MINTO, and it gives you both a plan to stick to and monitor.

It's also important to build in a buffer and take a look at outside factors that might affect the number of calls you need to make in a given month. Is January typically a hard month to get people on the phone? Adjust the amount of calls you make that month, or plan to increase the number of people you get on the phone before Jan. 1.

5. Replace Negative Self Talk

You know what I'm talking about. You miss your number and your thought process goes something like this: "Oh no, my manager is probably going to put me on a performance plan. I can already tell I'm going to struggle meeting my number this month. I'm definitely going to get fired. How am I going to pay bills? What's my family going to do ... "

This is serious stuff. But dwelling on it isn't going to make you better at selling. Instead, focus on what you can control, and take steps to write a more positive ending for your sales quarter.

That instantly turns your negative self-talk into something positive and actionable like this: "My boss put me on a performance plan because she wants me to succeed. I am going to work as hard as I can to meet my numbers by doing X, Y, and Z. I'm also going to be honest with my family and friends, so that I'm not going through this alone."

6. Give Yourself Time to Relax

Whether it's an hour or a day, your body will perform better if you give yourself time to shut down, recharge, and think about something other than work. Take a 15-minute walk outside your building, spend Saturday with friends, or call it a night at a reasonable hour and have dinner with your family.

Staying focused is crucial to getting a hold on your number, but you can't do that if you're burned out, or worse, making yourself mentally or physically sick from your efforts. Give yourself time to unplug and be prepared to work hard when you get back.

7. Accept Tough Talk From Your Boss

When you don't meet your number, it reflects poorly on both of you and on the bottom line of the company. Be prepared for some critique and frustration from your manager.

If you truly feel your quota is unrealistic, tell your boss (and be prepared to back it up with objective data, like how deeply penetrated your territory is or how many new accounts you'd have to sign). But more likely, you didn't meet your number for reasons within your control. Now you have to answer for this.

Don't be defensive. Take responsibility for not meeting your quota, and tell your boss you're ready to work hard and put together a solid strategy for moving forward. This will go over much better than making excuses, trying to defend yourself, or outright contradicting your manager.

8. Conduct Call Reviews

If you and your manager aren't meeting on a weekly or bi-weekly basis to listen to recordings of your phone calls and demos, ask if you can schedule a recurring time to do so. But don't stop there - until you're back on track, you need all the help you can get. Ask a top-performing rep on your team and/or your mentor to listen to a recording with you as well.

Ask for brutal honesty and you'll likely get it. It's also a smart idea to shadow other salespeople or sit in other salespeople's call reviews, if they're open to that. Is there a colleague who crushes it every quarter? Make it a point to catch their call review and find out what they're doing right. It's also beneficial to ask this person to sit in on one of your call reviews. That way, you can get their perspective on your work as well.

Bad sales quarters are part of being in the business. They can be rough, soul-bearing periods of time. But they can also make you better, both personally and professionally. Don't sugar coat your sales slump, but don't give up on yourself either. Move forward positively and remember why you love what you do.



My notes on Surpassing Targets and Underachieving

Staying Motivated

Motivation is a process that you can develop within yourself that enables you to meet goals. It is your desire to make sales and satisfy customers. Motivation levels are often affected by outside influences such as bad bosses, a rough economy, customer rejection and relentless competition. Regardless of outside influences, there is ample research that indicates salespeople can manage their own levels of motivation.

Why do salespeople need consistent motivation?

- In sales, failures greatly outnumber successes. For every 10 new sales calls, a great salesperson may only achieve success in three.
- Persistent rejection is difficult to manage. High failure rates can be discouraging even for seasoned salespeople.

Top 10 strategies great salespeople use to stay motivate;

1. Make a plan – and stick to it

Everything starts with an objective. The first thing that should be done each year is to create an annual sales plan. Once that is done, the next is to figure out in great detail how this will be accomplished. Keeping it up, making adjustments at least monthly, will help you to keep focused and motivated.

2. Build a disciplined personal selling process

From picking up emails to returning sales calls, great performance is a result of consistently doing the right things daily. Great salespeople do not need their managers to tell them what needs to be done.

3. Focus on activities versus results

Task yourself with daily, weekly and monthly sales activities. These activities should correlate to the income and sales goals. Determining the number of calls, quotes, and presentations and then meeting them is a self-motivating formula.

4. Participate in war stories

One of the greatest sources of motivation is “war stories”. Hearing the steps and processes used by other salespeople to win big deals opens up the mind to new approaches and applications. Many great sales ideas come after sales meetings and from informal conversations that follow.

5. Align with the best

Winning is contagious. Spending time with great performers is a great source of motivation. Observing and learning what makes others great can lead to great clues on how to improve personal performance.

6. Stay in shape

Sales can be a grueling physical business. Traveling, dealing with stressful situations and constantly meeting deadlines, can wear even the best down. Eating right, exercising and getting enough sleep keep the salesperson alert and energetic.

7. Get outside the business

Working hard is important. However, taking time to learn and participate in activities outside your industry sustains motivation. Sometimes the greatest ideas come from sources completely remote from the daily business. Activities that include cultural events, sports, church, community and education can be a great source of personal motivation.

8. Eliminate negativity

Remove and separate from negative influences. Nothing can destroy motivation more than a negative coworker or boss. The power of positive thinking is indisputable.

9. Be a mentor

Helping others is a great source of self-motivation. Research tells us that losing oneself in the service of others can make us happy and motivated.

10. Take mental health breaks

It is no use beating your head against the wall. Sometimes slowing down can help us see problems in a new light. Taking a break and doing some quiet thinking can reinvigorate personal motivation.



Further Learning: Tips to stay Motivated

9 Smart Ways to Stay Motivated All Day

<https://blog.hubspot.com/marketing/motivation-exercises>

13 TED Talks every sales and marketing pro should watch

<https://blog.salesflare.com/13-ted-talks-sales-marketing>



My notes on Staying Motivated

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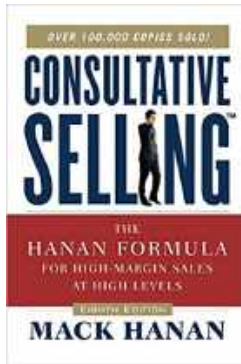
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Recommended Reading

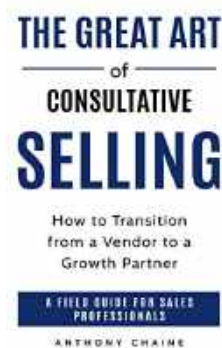


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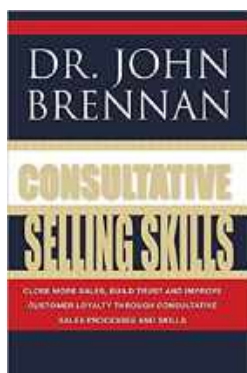
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