

SALES PROCESS

Your Sales Process Guide

*Giving your customers the
opportunity to say "Yes"*



SALES

Your Sales Process

Overview

Your sales process should be designed to create customers, not sales. The sale should be the inevitable result of having the right product for the right customer in a selling process that recognizes customer purchase decision needs as the driving force.

When considering your product, prospective customers will have purchase-decision needs represented by the Seven Selling Functions — information, understanding, needs clarification, advice, assistance, reassurance, and transaction processing. The specific needs of individual customers will depend on their perception of the impact the purchase will have on them and the confidence they feel in making the decision to buy. Your job is to satisfy those needs so they can find the rational and logical support for the emotional decision to buy.

This booklet presents a universal lead conversion process by which you can meet your customers' purchase-decision needs. It fits any business or product and can be customized for your target market. Each step of the process builds on the previous one to give your customers the support they need for their purchase decisions.

Key Points

There are two essential elements of your sales infrastructure that will affect how you structure your selling process: people and paths. These are the ways you staff your sales process and the channels you choose to sell your product.

Think about who best sells your product. The five most typical sales-force configurations are:

1. Automated
2. Order-taking
3. Conventional
4. Consultative
5. Inside or external staff

A general rule in choosing a selling mode is that the more selling functions your customer requires for the purchase decision, the more important the relationship-building qualities in your sales method.

How does your selling message best reach your customer? Familiar sales channels include:

1. Telephone
2. Mail
3. Direct-response print media
4. Face-to-face selling
5. Stores or other on-site outlets
6. The Internet

Take a fresh look at your sales staffing and channels. There may be alternative ways to accomplish your goals even though they're not traditional in your industry.



The Universal Sales Process

Engage with Your Prospective Customer



Repeat the Emotional Message



Determine the Customer's Needs



Provide a Solution



Offer the Product



The Best Sale Is No Sale at All

“I’m interested! I’ll take it! I love it!”

If you’re in business, this is your dream sale. No selling, just a responsive, confident customer, the right product, and an inevitable sale.

But more often than not, selling isn’t that easy. Trying to convince someone to do something they may not want to do is work. And that’s what selling usually feels like — convincing, cajoling, and struggling against resistance.

So how do you get from selling to a dream sale? And where do you find those responsive, confident customers who recognize the value of your product or service and don’t need to be sold?

The first thing you do is stop selling. Selling is about the seller. It focuses on you and what you need. If you’re

thinking about what you need to do next to make the sale, you aren’t focusing on your customer.

So think about your products and services from your customers’ perspective. What do they need? After all, you’re in this together. You need their patronage to grow your business, and they need products and relationships that will gratify them. When you forget about the sale and look for ways you can satisfy your customers’ needs, the sale — when it comes — will be the inevitable result of giving your customers what they need to make the purchase decision. You won’t have to sell them.

If It’s Not Selling, What Is It?

When you make a sale, you don’t always create a customer. Selling has a short horizon and focuses on a single transaction. But a customer isn’t a one-time thing. At least not the customer you want. Depending on your business, your contact with your customers may be sustained or fleeting, daily or infrequent, but when they have a need for your product or service, you want them to come to you. You want a relationship. And that’s what your customers want, too. Products or services and relationships, because the help they need to make the right purchase decisions for themselves will come from you. At least, they hope it will. It’s your job to make them believers, to convert their interest and hope into the conviction that you can give them what they need.

What they need is support for the decision they’ve already made. By the time your potential customers — your leads — get to you, they’ve already made their way through the early steps of the purchase decision chain. They want your product, and now they’re looking for the logical confirmation and emotional support that will make them comfortable with their purchase decision.

If you want those responsive, confident customers, the ones in your dream sale, you’ll have to create them yourself. And here’s the good news — you can! Just remember that their needs, not the mechanics of a sales technique, must drive your sales process.

Customers Are Made, Not Born

You'll create a customer every time you use a needs-based selling system that delivers the emotional impact and credibility your prospects need to be comfortable with their purchase decisions. That means they have to experience the sincerity of your intentions and believe what you say. The only way you'll convince your potential customers that you're focused on their needs is if you really are focused on their needs! Your selling process speaks volumes about your intentions. If customers are pressured, pushed, or manipulated, they'll know your selling process serves you and not them.

As crazy as it sounds, you have to become indifferent to the sale. Focus, instead, on the process. Do the best job you can of accommodating your prospects' decision-making needs (presumably you've already seen to their product needs), then let the chips fall where they may. If you've done your job well, you'll have communicated your intention to create a long-term relationship dedicated to satisfying your customers' needs, and you'll convert a high percentage of your leads to customers. People will return to you time and time again when they need what you sell. They'll return because they know they'll get what they need. They'll know that you've made it your business to put their needs ahead of your own.

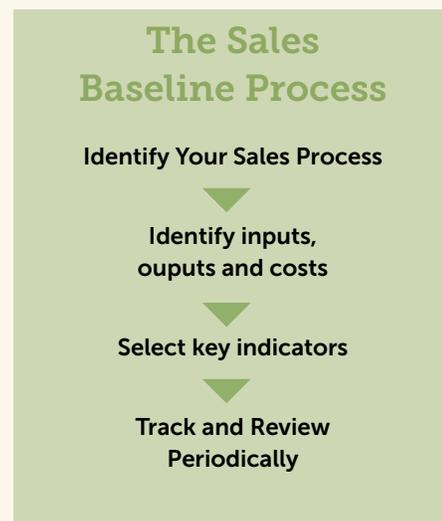
"Where We Are Now" In Lead Conversion

Establishing a baseline is an important first step before you dive into innovating your sales process. You'll be able to get a realistic picture of what you're currently doing; a basis for comparing this system's performance with others; better understanding of the financial impact of sales; and more effective delegation of accountabilities.

If you're thinking, "Let's just skip the baseline and get right to the business of building my new sales process," be careful. If you don't engage in this process, if you don't pay attention to this work, you will forever be shooting at a moving target with the wrong ammunition. You'll be changing things that don't need changing and ignoring the things that do. You'll be creating the wrong solutions for the wrong problems.

Another pitfall is the belief that it's impossible to completely systemize sales. People often say, "It's too individualized, too relationship-driven, too dependent on the talent of the salesperson and the personality of the customer. "Well, it just isn't true." Just as in any other area

of your business, there are patterns of action and thought that repeat themselves over and over. There are patterns in how your prospective customers act and think. And there are patterns in how you and your people respond to prospective customers, some of which work better than others.



Your Sales Baseline Process

1

Identify the process.

Get a clear picture of the boundaries of your current sales process — where it begins, where it ends, and the main steps in between. Without a clear picture of exactly what your current system entails, you'll have a hard time evaluating it with any degree of accuracy.

Use the Process Identification Worksheet in the worksheets section of this process to define the boundaries and content of your current sales process. Sometimes, the line between lead generation — attracting qualified leads through a message to a mass audience — and sales— addressing the needs of individual qualified leads to the point where they can make a buying decision — can be a little blurry and hard to distinguish. But it's critical for you to draw that line before you go to the next step. Don't labor over it, though. The fact of the matter is, the line can be a fluid one that may change over time, depending on how you approach and deal with customers and potential customers.

2

Identify and describe inputs, outputs, and costs.

Complete a Process Baseline Worksheet for your sales process. Start by identifying all the inputs, outputs, and costs that are associated with it. Then describe each of the inputs and outputs by looking at their Quality, Quantity, Timing and Intangibles. These will help you paint the picture of lead conversion in your business and point you to those key indicators that will be most indicative of the health of your sales process.

3

Select key indicators.

If you've done a thorough job with your process baseline, the key indicators will be evident. Review your worksheets and highlight or circle those elements that say to you, "If I'm performing well, then our sales process is performing well." Some key indicators you should consider are: total sales (also, sales dollars), number of sales, average sale amount, lead conversion ratio, percentage change in sales, and total sales costs.

4

Track and review the key indicators periodically.

There is a huge benefit in creating the original baseline; however, you also need to continue to track and review your sales indicators. The long-term benefit is in the ongoing tracking and review of the key indicators you've identified. It's part of the continuous, never-ending business development cycle of innovation, quantification, and orchestration.

The Universal Five-Step Sales Process

Now that you've given up "selling," how do you design a sales process that accommodates your prospects' decision-making needs? Where do you start?

Regardless of your product or business, the heart of your selling process will always be the encounter with your customer. It's where the rubber hits the road, and your marketing and product strategies produce real-time results. So your sales process can't leave anything to chance. You've promised your customers satisfaction, and now you need an orchestrated approach to meeting their needs. You need a system.

There are five steps in your sales process, and each one builds on the previous one to give your customers the support they need for their purchase decisions. The steps work for any business or product, providing the structure for customizing the selling process for your target market. Here are the five benchmarks:

1

Engage with your prospective customer.

This step sets the tone for your future relationship. What kind of relationship do you want it to be? What do your customers want it to be? Here's where you declare your intentions.

2

Repeat the emotional message of your promise.

Your customers come to you with a provisional decision to buy your product because it promised to meet their emotional needs. What are those needs and what did you promise? How can you remind them that they've come to the right place?

3

Determine the customer's needs.

The more exactly you know what a given customer wants and needs, the better you'll be able to meet those needs. What does the customer really want? Why do they think they want it? Will your product meet the customer's

perceptions? If it does, how can you support them to take action on the decision to buy? Your salespeople must have a basic set of questions that will:

1. elicit customers' needs, and
2. point them toward which products to offer a particular customer and how to offer them.

4

Provide a solution.

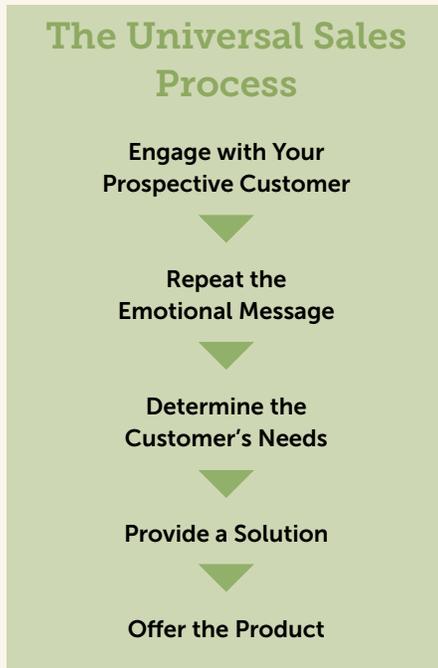
Here's where you can offer your customers unique, customized responses to their purchase decision needs. If they need confirmation of their product perceptions, you can supply it. If they need more information, advice, or reassurance, you can provide that too. Think about the best teacher you ever had — the one who was more interested in you than in merely explaining the subject matter — and try to be more of a teacher than a salesperson. Here's where you meet your customers' needs by educating them about your product.

5

Offer the product.

Either your customers will accept the "solution" or they won't. If they do, you need a purchase transaction to process the details. If they don't, you've built the foundation for a long-term relationship by attending to their needs. The door to a future relationship is wide open.

With the five-step universal sales process as your starting point, you can build a selling system specifically tailored for your business and market. Then you can apply your process to your customers in a way that satisfies each customer's individual needs. You start with a generic process that applies to everyone, but you end up serving the unique needs of each customer. It's the best of both worlds: the efficiencies of an orchestrated process and the customer focus of a customized process.



Designing Your Sales Process

To adapt the universal sales process, you must first have a clear understanding of how the next five steps play out in your business as a whole, and also allow for adjustments to meet the needs of each prospective customer.

1

Engage with your prospective customer.

This step is easy to dismiss as a mere formality, but it's where your customers begin to build their expectations of getting what they want — or not. Engagement means showing or creating interest. More than a simple greeting and a few pleasantries, it's an opportunity to demonstrate your commitment to giving them what they want out of your relationship.

Keep the focus on your customer. Develop real interest in them and their concerns. That may mean giving them physical space to browse, asking if they have time to talk with you before you start talking, or relieving them of responsibility for any interaction at all. In this step, you're setting the tone for the rest of the relationship and creat-

ing your customers' interest in pursuing it. What you need to be saying with words and actions is that their needs and comfort will be the overriding consideration every step of the way.

If you're a self-serve cafeteria with a customer base focused on quick, cheap food, this step may be respectful but brief. Even small gestures will establish your responsiveness to what your customer wants out of the relationship. If you're selling an expensive automobile, you may want to take a more leisurely and exploratory approach to the initial engagement. That way you give your customer room to become comfortable with you and their purchase.

2

Repeat the emotional message of your promise.

Your customer responded to something in the broadcast of your promise through your lead-generation process. Repeat the promise. That might be as simple as restating your unique selling proposition (USP) as you begin to

respond to the customer's questions, or it might involve a more elaborate description of the product's features and benefits that produce the effect your customer was drawn to. This step naturally links to the first step in the sales process — engaging the customer — because it's intended to reassure customers that they're in the right place to get what they want.

3

Determine the customer's needs.

What do your customers want and why do they think your product can give it to them? What is their perception of your product? And what do they need to be comfortable with the provisional emotional decision to buy that they made as the result of your lead generation?

The easiest and most straightforward way to determine the specific needs of individual customers is by asking questions. Think about ways to find out more about your customers. While some of this may seem dictated by the nature of your sales process, keep an open mind. Will your salespeople simply ask questions verbally? Will you use written approaches — such as questionnaires, surveys, and checklists — so you can refer back to what customers have said? Both verbal and written approaches have their advantages, and most businesses utilize a combination of the two.

When designing methods for determining and documenting customer needs, consider all the media available to you. For example, audio and video recordings and the Internet are more high-tech channels for broadcasting your questions and documenting the answers.

But how do you know which questions to ask? By developing an understanding of your customers' product perceptions and purchase-decision needs. Let's take a look at these two important elements of sales.

Your Customers' Product Perceptions

All your marketing and product-strategy work has been directed at communicating and delivering the promise your customers want to hear, and your research and strategy have been aimed at your target market. But in

your sales process, the individual is paramount. Two customers may have very different perceptions of the same product. You need to understand how your customers perceive your product and your business, and which attributes are most important to them and will be decisive in their purchase decision. When you know that, you can contribute to the decision in the way that best serves the customer.

For example, if you own a Mercedes-Benz dealership and you've researched your target market, you've aimed your marketing at a group of affluent, quality-oriented buyers who value prestige and performance. Your first customer, a self-made man, sees the Mercedes as both a reward for his accomplishment and the fitting automobile for his new status in the world. He is convinced on all levels to buy the car, and he certainly has the means to do it. But something's in the way.

It turns out that this man had great regard for his father — a hardworking, devoted family man who never made much money. His dad always drove a Ford. It never would have occurred to him to drive anything other than the most practical, reliable, inexpensive car on the road. That was his dad's measure of value.

Your customer can't help thinking that he should be doing the same thing. If the Ford was good enough for his father, it should be good enough for him. He wants the Mercedes, he values its quality and performance, he can afford it...but he can't find the comfort he needs because of underlying perceptions and associations related to automobiles.

Your second customer has different needs. While your marketing and lead-generation approach may have emphasized the Mercedes' luxury, status, and prestige, this customer couldn't care less. For him, the Mercedes is a machine — the best you can buy, or so he's told. And that's all he cares about. He wants to drive the best engineered car on the road. And if you're busy sharing your perception of your product as the height of prestige and beauty, you're not helping him. He doesn't care, and he's starting to think this isn't for him. He's starting to think

your product is all about appearance and status. Maybe this isn't the car for him.

So how can your salespeople approach potential customers whom they know nothing about, as individuals, and discover what they need to know? What could our Mercedes-Benz dealership owner ask in his lead conversion process to uncover the differing needs and perceptions of prospects looking at a Mercedes? How about:

- ▶ Tell me a little bit about the cars you had in your family while you were growing up, and other cars you've owned. How does that affect what you're looking for today?
- ▶ What are you driving now? How do you feel about it? What do you like most about your current vehicle, and what do you like least?
- ▶ What combination of qualities would your ideal automobile have?
- ▶ What have you heard or what do you think about the Mercedes that doesn't appeal to you? Why is that?

You could ask these same questions to every prospect, and get replies to lead you in precisely the right direction. This will allow you to find the best product offering you have for them and to position it in an appealing way. What's your version of these questions? Use the worksheet in the back of the booklet to write down your ideas.

Once you know how your customer perceives your product, you need to determine what support he or she needs for the purchase decision. How do you do that? How do you design a lead conversion process that accommodates your prospect's decision-making needs? And what are they?

▶ Your Customers' Decision Needs

There are seven needs-based functions your lead conversion process must offer customers: information, understanding, needs clarification, advice, assistance, reassurance, and transaction processing. From the customer's point of view, the selling process can be a blessing or a

curse. The negative side of selling is high pressure, misrepresentation, and an attitude of "anything to make the sale." The positive side is helpful, informative, reassuring, and "anything to help the customer make the right decision."

If you think in terms of what your customers need from your selling process, then translate that into what you have to do to help them through the process — in other words, base your selling process on their needs — you have the basis for a sound sales strategy. Let's look at what a needs-based selling process does for the customer. There are seven kinds of needs, and they translate into seven "selling functions":

Information: The facts. Providing information about the product or service, how to get it, what it does — anything the customer wants to know.

Understanding: For many products and services — and for many types of customers — facts alone are not enough. They want interpretation of the facts. They want to know what conclusions to draw. They want to understand what it means for them. This is especially critical for complex products such as insurance, investments, loans, real estate purchases, computers, automobiles, and so on.

Needs clarification: Surprisingly, many customers don't understand their own needs and desires, and are grateful for any help clarifying their needs. Think, for instance, of a young couple purchasing their first life insurance policy: They're not sure they need insurance at all, and the details of how much, what kind of life insurance, and numerous other questions are a mystery to them.

Advice: Customers want guidance on whether or not to buy, from what company, how to make payment, which options to choose, and so on. They want the advice to come from a source that is either objective and impartial, or biased in their (the customer's) favor. They look to friends, family, coworkers, professional advisors — and yes, even salespeople — for their advice.

Assistance: Sometimes customers need help in addition to information and advice: finding the right size and right style suit in a clothing store, filling out the forms for a small business medical insurance plan, getting a demonstration on how to use a new compact disc player, finding the ripest melon in the produce section of a grocery store.

Reassurance: All customers want to feel they are making the right purchase decision, but not all customers have the self-confidence necessary to provide their own reassurance. Providing them with the reassurance they're looking for — based on their stated (and unstated) needs — ensures a "win/win" situation.

Transaction processing: This is the sales transaction itself — money in exchange for goods or services. It can be as simple as paying for a candy bar at a checkout counter, or as complex as preparing and executing all the paperwork involved in the purchase of a new home.

Your customers may not need all the selling functions to develop comfort with their purchase decisions, but they'll need some. How many of the selling functions, and which ones, will depend on two factors: your customers' perception of the purchase impact of your product, and their confidence in making the decision to buy that product.

Impact and confidence determine which of the seven selling functions you need to build into your lead conversion process.

What must your process do to make sure your customers have the confidence to make the purchase? If they don't have it, they'll never reach the level of comfort they need to make the purchase decision.

Confidence is a funny thing. Some of your customers will have it from the start, some will need you to help them build it (through the seven selling functions), and some lack confidence completely. They may have to "borrow" it from you or someone else they respect and trust. Here's where your knowledge of your customers and

their perceptions of your product are indispensable. For example, there's an obvious difference between a candy bar and a new car, but a computer and a home theater, though matched in cost, may present very different purchase-decision challenges to the same customer. Both costly products have a significant financial impact, but each may require a different level of personal confidence for the purchase decision.

The home theater, as elaborate as it is, may still be just a television set to your customer. The technology is familiar and the product is relatively simple to use. But computer technology is relatively new and can be intimidating, especially for a first-time buyer. Even customers generally confident about making high-impact decisions may balk at making a purchase decision about an unfamiliar product. So, the same customer could need a different combination of selling functions for each product. Your lead conversion process needs to take this into account. Don't assume that high cost alone will dictate all seven selling functions, or that an ordinarily high-confidence customer will bring that confidence to every purchase decision.

Use your knowledge of your customers to design a process that's customized to their needs, because even the seven selling functions can mean different things to different customers. For example, "reassurance" doesn't mean the same thing to an adult patient in a doctor's office as it does to a teenage customer in a clothing store. Moreover, two teenagers in a clothing store may feel very different levels of confidence in selecting what they should wear. They may need very different levels of reassurance to complete the purchase. You need to know what your customer perceives reassurance to be.

When you know how your customers see the impact of the purchase of your product, and how confident they feel in making that purchase decision, you'll know which selling functions need to be included in your sales process. Use the Purchase Decision Needs Worksheet in the back of this booklet to list the specific decision needs your prospective customer is likely to have, and what you can do in your selling process to meet them. You'll now have a more complete idea of the logical and rational

support your customers need for their purchase decisions and what you can do to supply it.

For example, if your customers perceive the purchase of your product to have a high impact on their lives, but feel only moderate confidence in making this particular purchase decision, your selling process will have to include a lot of information, understanding, and advice. Your customers will need facts, an interpretation of those facts in light of their needs, and guidance about their choices.

Remember, in the sales process you're still dealing with an individual customer. So as you consider each of the seven selling functions, use the worksheet to list questions that will help you understand the individual's decision needs. Be prepared to concentrate on the decision needs your target market is likely to have, but build in the flexibility to discover and respond to all the decision needs an individual customer actually does have.

4

Provide a solution.

This is the step in your sales process which is most like traditional sales. Ordinarily, this is the place where you convince the customer to buy your product.

But if you remember "don't sell...satisfy," this is not where you convince the customer; this is where your customers convince themselves. This is where you help them discover whether your offering solves all or most of their needs. And this is where they get everything they need to be comfortable with their purchase decisions.

Your main goal in the solution presentation is to educate your customers about how your product or service will satisfy their needs. You know that they already believe it will on the emotional level; now you want them to enjoy the same assurance on the rational or logical level. This is your opportunity to share all your knowledge about the value of your product with your customers.

However, don't push too much information on them. Too much information can overwhelm them and detract from their growing confidence. Be prepared with all the information, but only give as much as the customers have

an appetite for. Be responsive, respectful, and on the customers' track, not yours.

Think back to the best teacher you ever had and you'll find the tone you want: excitement about the material and its benefits for your life, a pleasure in sharing information with you, and an offering of the information without strings. Your best teachers never tried to "sell" you; rather, they offered information and insight freely.

Think back to the two customers looking at the Mercedes-Benz. How could the solution presentation be tailored to meet both their needs?

The first customer wants the Mercedes prestige, but doesn't want to abandon the qualities of good value, practicality, and reliability that were important to his father, who drove Fords. Does he know that if he buys the Mercedes he'll probably never have to buy another car as long as he lives? This customer perceives some of the attributes of your product, but not all of them. He needs the part that's missing to be completely comfortable with his purchase decision.

The second customer won't have any problem with his purchase decision if you step back and don't push the part of the message about luxury, status, and prestige. He knows exactly what he wants — the best driving machine available — and only needs a narrow band of precise information to be sure he's making the right purchase. He doesn't need to have his perceptions broadened, just a confirmation of his expectations.

So aim your solution presentation at meeting your customers' needs. Anticipate and encourage questions, and give them every opportunity to develop the comfort level they need to make the purchase decision.

5

Offer the product.

This is the final step in the sales process. By now, your customers should have their questions answered and all the logical support they need for making the purchase.

This is the point where you'll be most tempted to push for a positive response. But remember, if you focus on the sale rather than creating a relationship of mutual trust, you may be sacrificing sales to this prospect in the future. If your customer feels too much pressure to buy, you may even lose this sale. And you can be sure the customer will tell all of her friends and family about her unpleasant experience with your salespeople.

So make your offer from your customers' point of view. Does the product meet their needs? Does it deliver what it promises? Are all their selling needs met? If the answers are "yes," you've got a sale. If the customer is not yet there, keep the door open. If you've done it right, he or she will be back.

Don't Forget the Overall Effect

Now that you've seen the the five universal benchmarks of a sales process, remember that none of the parts will work unless the overall effect meets the purchase decision needs of your customers. This includes all the things you do to offer your product to your customer, such as your sensory package, the quality of the interaction between your salespeople and the customer, the way product information is communicated through selling aids, even the words you choose to greet prospects or describe your product. All of these elements must be aimed at meeting your customers' purchase-decision needs, and should be linked to the particular selling functions that are most important to your prospects.

For example, new patients in a doctor's office are like potential customers in any business. Because of the nature of the services they are looking to "buy," they have a high need for reassurance, advice, and understanding. A flippant, lighthearted, and comic presentation of the doctor's services would not meet the usual customer's needs. The doctor and his or her staff need to choose a décor, a manner, and even words of greeting and communication that will carry the emotional impact and credibility to make patients feel they're in the right place. Subdued colors, authoritative information, and warm and friendly attention from staff serve to present the doctor's services

in a manner that meets the potential customer's needs. Although your family doctor may no longer wear a white coat, opting for the informality that street clothes offer, many specialists and hospital-based doctors still wear this traditional uniform because of the professionalism and authority it conveys. When you need specialized advice, the white coat (the badge of the medical professional) helps to reinforce your faith in the education and knowledge of the expert.

On the other hand, a flippant, lighthearted, comic presentation, along with bright colors and loud noise, might be just right in a video-games store. Those customers probably want a sense of fun, irreverence, and adventure, and engaging them on that level meets the needs they hope to satisfy with their purchase decision.

So when you think about showcasing your product and business in your sales process, think about the overall effect you want to communicate to your potential customer. Developing your sales process will give you an opportunity to test the decisions you made, and to innovate with the additional perspective of your customer preference research. You now have enough information to present your product and your business with real precision.

The Infrastructure of Sales — People and Paths

There are two essential elements of sales that directly affect how you move through the universal five steps:

1. People: the way you staff your sales process, and 2.

Paths: the channels you choose to sell your product.

These are strategic considerations, but they directly affect how you'll achieve the purpose of each of the steps in your selling process.

► **People:** Who best sells your product to your target market? The five most typical sales force configurations are automated, order-taking, conventional, consultative, and in-house or external. Each one tends to be appropriate for particular products or services, but don't let convention limit your thinking. Discovering a non-traditional approach to satisfying your potential customers' needs can set you apart from your competition. Just be sure to look at your choice through the eyes of your customers, and keep the following guidelines in mind:

Automated selling requires no human contact. Vending machines and computerized order-taking systems are prime examples of this mode and are particularly well suited to low-impact, low-confidence purchases because even the purchase transaction can be accomplished by a machine. An automated system is geared for sheer convenience, but is unforgiving of customer errors or questions. Its best use is in the simplest sales transactions, where relationship-building is irrelevant to repeat sales.

Order-taking is a sales method characterized by telephone operators, cashiers, waiters, and newsstand attendants. Although it is more people-friendly than an automated process, allowing for an exchange of information and sometimes limited advice and reassurance, it won't create as many opportunities for relationship-building as would conventional or consultative sales approaches. It is best suited for sales processes where customer confidence is relatively high regarding the impact of the purchase, and where technical product information is simple and obvious.

Conventional selling techniques are the kind usually found in retail stores, and generally involve a one-on-one exchange between salesperson and customer. This sales approach offers the most versatility in developing the process to address multiple decision needs. It also has the most potential to create relationships, because the salesperson can customize the system to the needs of the particular customer.

Consultative sales personnel are generally "experts" like financial planners, stockbrokers, insurance agents, lawyers, and other independent professionals, as well as those selling highly complex products such as computers or real estate. Consultative selling is most appropriate when the purchase decision has a high impact and requires specialized knowledge.

Inside staff or external agents are two choices for a sales force. Sometimes it's more cost effective to use independent agents to sell your product, especially if your sales territory is large but doesn't warrant a full-time, in-house sales force.

Your product and the purchase-decision needs of your potential customers will shape your selling mode, but here's a general rule: The more selling functions your customer requires for the purchase decision, the more important the relationship-building qualities in your sales method.

If your choice of selling method includes the use of people, you need to think about what kind of people. For example, if you sell computers, you'll be looking for salespeople with the patience to learn about the technical features of the product and the ability to communicate the attributes of each model to the customer. They may not initially need a lot of knowledge, but they'll have to be willing to learn and have the ability to communicate complex information clearly. A salesperson for a clothing store might not need to be able to grasp detailed, technical information, but may need the ability to give advice

and communicate reassurance credibly. What knowledge, abilities, and personality traits would the ideal salesperson for your product and customer have?

► **Paths:** How does your selling message best get to your customer? It depends on your product and how your customer feels about its purchase, but some products lend themselves more easily to certain communication channels than others. Traditional sales channels include:

Telephone (telemarketing)

Mail (catalog sales and direct mail)

Direct-response print media (magazines, newspapers)

Face-to-face selling at your location or your customer's

Selling at stores or other on-site outlets

Here again, don't let customary practices limit your view. Other selling channels, such as the Internet, are developing all the time. In the past, most selling was seen as a one-to-one, in-person activity, but changes in lifestyle and technology have created new selling channels for many products.

Catalog shopping, especially for high-end products, had been one of the biggest changes in retailing since the advent of the department store. Customers, increasingly strapped for time and less willing to venture out at night to shop, found catalogs and their television equivalent (home shopping networks) attractive and convenient replacements for in-store shopping. The home shopping networks even use automated order-taking, something the high-touch retail selling world would have considered unthinkable just a few years ago. Today, retail sales through a store on a company's website have outpaced the mail catalog in popularity as a sales channel.

Take a fresh look at your lead conversion paths. Could a new sales channel be more effective than your current choice? Could it be an addition? Have you overlooked possibilities for expansion because they're not traditional in your business?

Innovating Your Sales Process

You now have all the pieces you need to innovate your sales process:

- An understanding of your customers' purchase-decision needs and what you could do to satisfy them,
- A set of structured benchmarks for selling to your customers,
- Considerations about the people and paths you might use to offer your product to your customer.

Use the universal five-step sales process, plus what you've learned about your lead conversion infrastructure during your baselining process, to guide your innovations. Once you've completed the innovation process, use the Sales Process Worksheet to draw a box-and arrow diagram of your new system and identify which of the universal five steps of sales each benchmark represents.

Example — What To Wear Revisited

Let's look at how Joan and Tony Romero of What To Wear used the five-step sales system to clarify and innovate their own selling process. What To Wear is a retail clothing business that sells men's and women's apparel. They have three stores and employ 22 people, both full and part time.

The first thing the Romeros did was to create a box-and-arrow diagram during their baseline evaluation to see if their current sales process contained the five steps of the universal sales process. As you can see in the diagram below, the Romeros found that their current selling process contained only two of the five steps — engagement and the solution presentation.



Here's how the Romeros set out to revamp the sales process at What To Wear.

Step One — Engage Your Prospective Customer

Joan and Tony Romero had been in business for almost twenty years. Although most of their time was involved with management tasks, Joan still sold on the floor some afternoons and Saturdays. She had always been an effective salesperson, and although she had excellent help on and off over the years, her salespeople had never been consistent. Joan thought the ability to sell was a "gift" — you either had it or you didn't — and this made recruiting a hit-or-miss operation. It was hard to tell if someone had the gift or not in an interview. A bubbly, outgoing personality didn't always indicate an ability to sell.

Joan and Tony were determined to systemize their sales process. They had identified some patterns of behavior shared by their best salespeople. Using the five steps

of the universal sales system as benchmarks, they were going to construct a process for all their salespeople to follow.

By referring to their sales baseline, Joan and Tony saw that their engagement with the prospective customer didn't start until a salesperson happened to notice that someone was in the store. It was hit-or-miss situation, because if the salespeople were busy, a customer could wander around without being greeted or acknowledged for some time. Joan noticed that some people just walked out, and she worried not only about lost sales, but gaining a reputation for poor service. She also noticed that her salespeople didn't engage with the customer until the customer began to ask serious ques-

tions about their clothing. They may have greeted them pleasantly, but they didn't engage — that is, show or create interest. Joan knew there was plenty of room for improvement.

Joan and Tony called an employee meeting and asked for everyone's input for improving their selling process. First, they shared the work they had done on the box-and-arrow diagram they created for their present system, then they worked with their employees to identify which of their own steps corresponded with the steps of the universal sales process. Once that was done, they focused on engaging with the customer. They figured that by envisioning the perfect engagement step, identifying its components and then incorporating them in everyone's actions, they could set standards to measure their own performance and any improvements they might make. The Romeros' staff was intrigued by the idea. Creating the perfect sale was a great game and gave them an opportunity not only to be creative, but to voice their pet peeves about the whole process.

During the meeting, the staff confirmed Joan's initial assessment: the greatest weakness in their selling activities was their approach to the customer at the front end. The salespeople commented that they didn't always know when a new customer entered the store and, if they were busy with another customer, it might be 10 or 15 minutes

before they could break away. Everyone agreed that was far too long to let a customer wander through the store without any acknowledgment.

The staff decided to set a new standard: every customer had to be greeted and engaged as soon as they entered the store. One salesperson suggested they install a device that gave off a soft tone when someone came through the door, alerting them that they had a customer. They also agreed that whatever they were doing short of actually processing a sales transaction, they would excuse themselves and greet new customers as if they were newly arrived visitors to their home. The greeting would include giving the customer their name, a question about whether they'd been in the store before, and the assurance that they would return to the customer in just a few minutes. Although they wondered if this system would be better (would the customer being served be offended if the salesperson took a moment to greet a just-entering customer?) they decided to test it for a month. What To Wear's new standard for engaging the prospective customer was created.

Step Two — Repeat the Emotional Message

What To Wear's USP is "Good taste for every occasion!" It's a promise of appropriateness and variety. A customer can expect to find casual, work, and evening wear, all at the same location. The Romeros and their staff discussed what this means to their customers, and how they could reinforce the promise they were making and distinguish themselves from other retailers.

As they continued to think about what they could do to communicate the emotional part of their message to customers entering their stores, they listed the following ideas:

- ▶ State What To Wear's unique selling proposition (USP).
- ▶ State their positioning statement, or a version of it.
- ▶ Emphasize the quality and selection of the clothing.
- ▶ Emphasize their attention to individualized service.
- ▶ Explain how the store is organized.
- ▶ Offer a children's activity center as a customer service.
- ▶ Pave the way for finding out more about the customer's particular needs.

They felt that this was a sound and realistic list of what salespeople could consistently do to establish or re-establish an emotional connection with customers. And the staff became excited about the potential for communicating this important aspect of what What To Wear had

to offer. They enjoyed their role in creating customers, especially compared to their traditional view of themselves as sales clerks, who did little more than show merchandise and transact sales.

Step Three — Determine the Customer's Needs

When the Romeros and their staff began to think about accomplishing this step in the sales benchmarks, they realized they hadn't been giving it enough attention. They decided to devote some time to discussing the purchase impact of their product and the confidence level of their customers in order to fine tune their lead conversion process.

When they looked at their selling process, they realized they usually only asked the customer a few questions ("What are you looking for? What kind of dress, suit, gown, etc.? What's your size?"). They were missing opportunities to learn more about the customer, including what he or she really needed. So they looked at the purchase decision from their customers' point of view. What did their customers need?

The Romeros and their staff decided that the financial impact of their customers' clothing purchases was moderate. At the same time their customers were very con-

cerned with how they looked. Their purchases could have a high impact on their self-image. Experience also told them that most of their customers needed to develop some confidence about their purchases; some of that confidence would come from the reassurance and advice of the staff.

So they designed a series of questions that would give them basic information about what the customer was looking for. Then they created some additional questions to tell them how the customer felt about making the purchase, for what occasion they were buying the clothing, and how they felt about shopping. This would allow them to assess how much information, advice, assistance, or reassurance each customer needed. Everyone now felt they had a systematic, foolproof method for learning what customers wanted and considered important, and for giving them the help they really wanted.

Step Four — Present the Solution

With the customer's needs well in mind now, the Romeros and their staff felt they could really showcase their skills in helping people find flattering and appropriate clothing. This part of the sales process included identifying specific articles of clothing that would meet the needs of the occasion. Since the salespeople had taken the time to determine the customer's needs, they could also speak to his or her concerns and uncertainties, explaining why a particular garment would be a good choice, or comparing the features of several possible

choices so the customer could weigh the relative advantages more easily. The Romeros always felt they had what customers wanted, but they were depending on star salespeople to communicate that to customers. By sharing everyone's best ideas and customer-assistance practices, and then including the ones they liked best in a selling process they would all use, the owners and staff of What To Wear believed that anyone could use their new sales system and be an excellent salesperson.

Step Five — Offer the Product

Many of Joan and Tony’s salespeople faltered at this step because they were not sure how to close a sale. It was a step full of uncertainty, in which they either waited for the customer to indicate interest or they pressed too hard. Some of the Romeros’ staff (the “stars”) didn’t seem troubled at this point and were very successful, but for most of What To Wear’s sales force, this was a weak point in the process.

Joan and Tony felt that clarifying their expectations for this part of the selling process might help their staff create a different approach. They explained that their business had been built on service to the customer, and a key to their success was building a loyal customer base with repeat business. They spent a lot of time re-positioning the selling process with their salespeople, placing the emphasis on satisfying customer needs rather than forcing a sale. They explained that their measure of success was returning customers and not the daily sales total. The sales would come if they focused on the customer — what products they wanted to find and what kind of help they needed with their purchase decisions.

This was a new slant for most of the Romeros’ staff. Until now, most of them thought selling was about convincing, and most of them didn’t like it. They loved working with customers, and they were proud of their merchandise, but they hated that final confrontation of the close. Somehow, in that last step, they felt they had to abandon all the relationship building they had done naturally and try to get the customer to buy.

The Romeros and their staff decided on a format for offering the product that emphasized the value of the purchase to the customer, in light of the customer’s expressed needs. They didn’t try to “sell.” They trusted their customers to make the decision for themselves once all their needs were met, and they agreed that the customer should never feel uncomfortable about not buying. What To Wear’s doors would always be open to their customers no matter what the outcome of their visit.

The Romeros captured their ideas for formatting the five steps of the lead conversion process, and their best practices serving customers, on a revised box-and-arrow diagram. They now had a system with a series of benchmarks for their selling process.



Orchestrating, Documenting and Quantifying Your Sales Process

For most selling situations, the heart of orchestration is some form of scripting. You'll want to think about creating presentation scripts you can customize for your business and your target market. These scripts will guide your salespeople and your customers step by step through this interaction. Although any selling encounter can be unpredictable, scripts create a structure for ensuring that each customer gets consistent information and service.

You'll also need to quantify the results your new system is achieving in order to see how well it's giving your business what it needs. You will want to create a set of

indicators to monitor your progress with respect to those important lead conversion measurements. In addition, a tracking report will show you the effectiveness of the individual benchmarks in your newly innovated sales process. This will allow you to pinpoint exactly where the process is working best and where to focus attention to get even better results.

It's Not a Sale, It's a Relationship

Everything you've learned in this business development process has been geared toward building a relationship of mutual support with your prospective customers. By taking your focus off the sale and concentrating on your customers' needs, you'll send a powerful message of concern for customer satisfaction that will earn you continued patronage.

But what about the sale? Don't you need that, too? You do. That's why you're in business. But your sales won't come from "selling." They'll come from the assistance you

give your customers in finding comfort with the purchase decisions they've already made. So while you may have to give up "selling," you'll trade a sale for a relationship of mutual support and satisfaction that will provide you with many sales as long as you're in business.