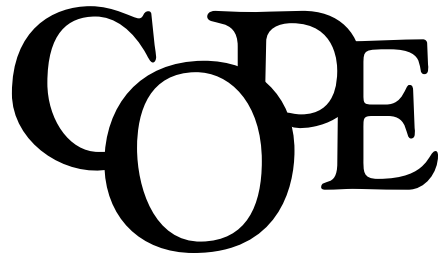


# The Center for Organizational and Personal Excellence



## Consultative Selling: A Model for Sales Success

*An Introductory Sales Development Program  
for Account Managers*

This **Consultative Selling** Account Manager Introductory Sales Development Program contains eight modules and seven building blocks for sales success:

- Module #1: Consultative Selling: A Model for Sales Success;
- Module #2: Block #1: Call Preparation (Self and Call Preparation);
- Module #3: Block #2: Opening the Call/Making the Connection;
- Module #4: Block #3: Probing and Uncovering Customer Needs;
- Module #5: Block #4: Tailoring a Response/Presentation;
- Module #6: Block #5: Handling Customer Questions/Objections;
- Module #7: Block #6: The A,B,C's of Closing the Sale (and Addressing the Issue); and
- Module #8: Block #7: Follow-Through (Internal and External).

Participants will have an opportunity to understand these concepts and develop skills to contribute to the success experienced by themselves, their teams and the organization. An emphasis is placed on individual and small-group “hands on” activities which apply and reinforce the concepts.

Participant's Workbook; V1, 1/2007

The Center for Organizational and Personal Excellence

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“Vision Without Action  
Is Just a Dream.  
Action Without Vision  
Just Passes the Time.  
But, Vision and Action  
Can Change the World.”

Robert Barker, Futurist

“Sales is...Identifying the customers wants and needs, and helping the customer meet those wants and needs.”

Consultative selling is....building long-term business relationships by staying proactive and being solutions oriented.”

- \*The process must benefit both parties, buyer and the seller.
- \*It considers each person’s feelings to be important.
- \*Focus on we (buyer and seller) and not just me (seller).

Remember: You need the **helping** instinct, not the **killer** instinct.

“Quality Customer Service will give any individual or any organization long term competitive advantage. If you build and support it within the structure of the organization, and nurture and recognize it within the character of the individual, there is no way that this can be duplicated. It becomes an individual’s and an organization’s competitive advantage.”

Stephen Covey, Author  
*Seven Habits of Effective People*

## Consultative Selling Skills

**The What = Quality and Results**

**The Who = Account Manager and Customer**

**The How = Skills and Behavioral Flexibility**

### Program Objectives

- To enhance each Sales Account Managers understanding of Effective Selling, Consultative Selling and the building blocks for sales success,
- To provide an opportunity for Sales Account Manager's to learn and practice concepts by applying them to real "on-the-job" situations in order to strengthen their skills and abilities, and
- To identify and experience the benefits of planning, listening, presenting, handling and closing to increase sales.

### Program Modules

- Module #1:** Consultative Selling: A Model for Sales Success
- Module #2:** Block #1: Call Preparation (Self Preparation and Call Preparation)
- Module #3:** Block #2: Opening the Call/Making the Connection
- Module #4:** Block #3: Probing and Uncovering Customer Needs
- Module #5:** Block #4: Tailoring a Response/Presentation
- Module #6:** Block #5: Handling Customer Questions/Objections
- Module #7:** Block #6: The A, B, C's of Closing the Sale (or Addressing the Issue)
- Module #8:** Block #7: Follow-Through (Internal and External)

# Using Behavior Modeling to Acquire Skills: Six Steps

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1. Understand Why the Skill is Important for the Job. Each training and development module provides an overview of the topic and its importance. Specific sales situations where the skill can be used, as well as typical “cues” for using the skill, are mentioned. As part of each session, you will discuss how the skill can be used in your role and what the impact could be if the skill was applied.

2. Identify the Key Actions Involved in the Skill. Through individual reading for each module and class discussions, you will identify and analyze the steps or Key Actions involved in the successful use of the skill. The rationale for each Key Action, “The Why” will be covered, as well as specific examples, of “The How.”

3. See a Demonstration of the Key Actions. For each set of Key Actions, you will see a role play “scenario” demonstration. These demonstrations will show a Account Manager and Customer interaction in a realistic and appropriate manner. These demonstrations are based on realistic situations from your organization. Participants will take notes on these role-play scenarios and will discuss how the Key Actions were used and what effect they had on the interaction. Areas for improvement will also be discussed.

4. Practice the Key Actions. Practice is at the heart of behavior modeling. Practice is required to perfect any skill. Practice builds the skill itself, along with the confidence to apply it to real-time situations.

5. Receive Constructive Feedback on the Use of the Key Actions. Feedback lets individuals know when they have succeeded. Additionally, it also provides someone with information about what aspects of their behavior need to be modified. Participants will receive feedback from fellow participants. This feedback will be based on concrete observation notes taken during individual role-play opportunities.

6. Identify Applications for Key Actions at Work. Individuals will learn about and practice “the rule of three” identifying the skill goals, anticipating obstacles and planning counter-measures in order to apply concepts.

# Seven Basic “Effective Selling” Principles

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**1. Focus on the specific situation, issue or behavior, not on the person.** Whether one is talking about child-rearing, supervision, or selling, this principle is key to one’s effectiveness in interacting with others. By using this principle, one builds rapport.

**2. Demonstrate trust and respect in order to support the self-confidence and self-esteem of others.** Relationships at home and at work are built upon trust and respect. Take the time to treat others *the way they want to be treated* in order to establish a foundation for mutual respect.

**3. Strengthen cooperative and constructive relationships with others.** Healthy relationships reduce stress and increase morale which strengthens interdependent work relationships and sales relationships.

**4. Never underestimate the power of effective communication and teamwork.** Two-way communication and teamwork go hand-in-hand. Communication and teamwork are essential to success for all high performing sports and organizational teams. Open communication also strengthens customer confidence and loyalty.

**5. Lead by example and take initiative to make things happen.** “Just Do It!” By taking initiative and leading by example you are able to demonstrate to others in your organization, and to your customers, what is important to you. This behavior provides “value-added” benefits, in the eyes of your customers, which differentiates you from the competition.

**6. Obtain the information first, by asking open-ended questions.** In order to provide consultative services, a sales person needs to understand the customer’s situation “from the customer’s perspective.” By asking a series of open-ended questions, a sales person creates a non-judgmental environment for obtaining the information they need.

**7. Understand that personal styles and preferences require behavioral flexibility.** As human beings, we share one thing in common. We are all unique! Understanding the personal styles and preferences of ourselves and others provides us with the ability to adjust our style and preference to “match” that of another. As a result of this behavioral flexibility, we allow an individual to remain in their comfort zone. And when comfort levels increase, so does their ability to cooperate.

## Chapter One

### Level #1 Sales Skills

Welcome to sales training! Whether you are an experienced sales professional, a newcomer to sales, or work in a sales support function, there is always something you can do to sharpen your skills, and that's what this training is all about. The purpose of this training is to learn, or perhaps reinforce some basic principles of sales technique. We're going to cover various aspects of the sales call, which can be viewed from both an inbound and an outbound perspective. These include: effective call preparation, good questioning techniques, handling objections, and many other topics. This training will be useful and informative for anyone who desires to enhance their sales skills and should also be helpful for those who aspire to be promoted. Whether you are new to the organization, or are an experienced sales associate, it is anticipated that this training will provide you with a fresh perspective.

It has been said that there is no such thing as an excellent organization, only those that believe in continuous improvement. We'd like to view this concept on an individual level, by suggesting that there is no such thing as the "perfect" salesperson, only those who believe in continuous improvement. Just think for a moment, each one of us has specific skills, abilities, resources and experiences. And, where we are now, in terms of what we are achieving, is the direct result of our past development, skills and commitment.

#### **Kaizen: Continuous Improvement**

Making incremental improvements, doing "little things" better;  
setting and achieving ever higher standards of performance.

The idea of continuous improvement simply means that we can always learn to do something better, more productively, more profitably, and the key to obtaining these type of results is for us to be...

- open,
- ready to learn,
- capable of sharing,
- willing to change and
- able to adapt how we conduct ourselves.

We are anticipating that this training will provide you with the opportunity to share and shape secrets of personal success within the group. Working together and sharing ideas is the best way to both learn and help yourself to become the superior sales professional that you know you can be. So let's get started by examining a formula for your sales success.....

## Skills + Activities =Performance

This formula is quite simple. The **Skills** portion refers to the abilities, techniques and competencies that each one of us has as a sale professional. The **Activities** portion of the formula refers to both each sales associate's and their sales manager's visible observable actions or practices in applying their skills to their day-to-day challenges and responsibilities. And the **Performance** segment of the equation refers to the results that both sales associates, sales managers, sales teams and the organization achieves.

What are some examples of skills that you currently have and activities which you currently demonstrate which significantly influence your performance?

•My Skills: \_\_\_\_\_

•My Activities: \_\_\_\_\_

•How satisfied are you with your current level of skills and activities and your performance?  
\_\_\_\_\_

What is the single most important ingredient to your sales success?

# The Five Elements of the Sales Process: An Overview

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## The Five Elements of the Sales Process

The sales process can be summarized into five essential elements, each of which have to be present during a sales associates interactions with a customer in order for the contact to be considered **a sales contact and not a social contact**. These elements are as follows: Planning, Listening, Presenting, Handling and Closing. Let's define them individually and outline how the Level #1 Sales Skill Training resources will relate to each of the five elements.

**Planning:** It has been said that “opportunity is where preparation meets challenge” and the initial planning process plays a significant role in a sales associates foundation for success.

1. It allows you to be thorough and include all points necessary to make a good presentation—such things as benefits, customer information, possible objections and closes.
2. Because you are prepared you feel more confident. This confidence is passed on through your voice. Subtle, but different, inflections and tones send out the message of “confidence.”
3. Because you are more confident, your customer notices automatically, believes your presentation more, and is more likely to buy your product or service.

**Block #1: Call Preparation** of Level #1 Sales Training includes the following planning information.

1. Adapting Your Attitude
2. Self-Esteem
3. Avoiding Negativity
4. Self-Talk/Affirmations
5. Readiness/Success Model
6. Planning Your Approach
7. Prospecting Preparation
8. Qualifying Your Prospects
9. Handling Rejection

**What are the benefits to you and your customer of Planning & Call Preparation?**

# The Five Elements of the Sales Process: An Overview

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**Listening:** Effective communication begins with focused listening for understanding. We truly can't say that we understand the customer's perspective without first taking the time and concentration to listen to what they have to say. By truly listening, you are building that unspoken bond between you and your customer. We've all been around a person who talked constantly and never listened. Generally, we can't wait to get away. If you are doing this with your customers, they will react the same way. It's so very important to put some "body language" into your phone conversation, such as saying "uh huh," or "I see."

**Why is Listening to customer needs, as well as communicating your understanding and reinforcement of their message, must for successful sales professionals?**

**Block #2: Opening The Call/Making The Connection** of Level #1 Sales Training includes the following listening and communications information.

10. Establishing the Purpose of the Call
11. Telephone Skills/Etiquette
12. First Impressions
13. Speaking the Prospect's Language

**What is meant by "Making the Connection" and can a call be considered a success if you made the connection with a customer's voice mail?**

**Block #3: Probing and Uncovering Customer Needs** of Level #1 Sales Training also includes the following listening and communications information.

14. Asking Open-Ended Questions
15. Listening for Understanding
16. Managing Distractions/Self Discipline
17. Responding with Responsiveness

**Why is the skillful use of open-ended questioning techniques important in Consultative Selling and how can you strengthen your ability in this area?**