

Getting into Bigger Companies for **Bigger Sales**

(And what
to do once you
get there)



Tom Searcy



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INTRODUCTION

Albert Einstein once said, “The significant problems we have cannot be solved at the same level of thinking with which we created them.”

Never has this statement been more true than it is today. Such attempts are visible on a macro level. For instance, think of the government — not only in the U.S. but around the world — and its efforts to get the economy started again. Then, on a micro level, think about why the sales strategies that worked for you a year ago are actually detrimental to you now. You know you need to develop new ones, but your mindset is still in the same place it was back then. Dilemma? Well, not if you’re willing to commit to approaching rising problems with new solutions.

Altering your level of thinking is especially important when it comes to your process for hunting big sales. Assuming that you’re looking to improve your strategy in light of the economy and rise of social media tools — both being things that have changed the sales status quo — just keep in mind that your new solutions should have the following attributes:

- a** New mindset/New understanding of circumstances
- a** New language
- a** New processes
- a** New procedures

I’m not saying that you need to change absolutely everything in order to hunt big sales in this economy. Rather, I’m suggesting you concentrate on a few things that will make a huge difference.

My goal is to give you a few ways to land new sales, secure a larger first purchase, and *simply* get in to see the buyers in the first place (not that there’s anything simple about that!)

I cover all of this and more in the following chapters.

Now, let’s hunt!

Tom



CHAPTER 1

Challenges Hunters Face



I KNOW I DON'T HAVE TO TELL YOU THIS, BUT I'LL say it anyway: selling never has been the easiest game in town. But for the past 14 years or so, we've built processes and strategies that have worked in most situations.

In **stable economic** times, you could bake yourself into your clients' *normal* budgeting cycles because there actually were *normal* budgeting cycles.

Not anymore.

You could also depend on their *normal* contract lengths as they ran through their 1-year, 2-year, or 3-year contracts with vendors. You could even build your tickler files for dates when those events were going to occur.

Not anymore.

Companies had strategic plans and capital initiatives. You could anticipate what was going to happen and prepare yourself for that eventuality.

Not anymore.

Selling your customers was about reaching people with budgets and business initiatives.

Not anymore.

You're walking into different circumstances from what you've grown accustomed to over the last 4, 10, or 14 years.



Let me give you four “then and now” examples to elucidate these new challenges:

1 Gatekeeper

Then: Back in the day, companies had gatekeepers in the form of actual people who would manage other peoples’ calendars. Secretaries and assistants were proficient in looking out for the their bosses’ best interest. The challenge in these days was to get past that person, whose ultimate decision could prove to be capricious and sometimes hostile. It wasn’t easy.

Now: You have to get past the digital gatekeepers — email, voicemail, LinkedIn, etc. Sure, you can send an email directly to the buyer, but they can just as easily delete it. You can leave them a voice mail, but they can ignore it. Message via LinkedIn or other social media platform? Well, just see “sending the buyer an email” or “leaving the buyer a voicemail.” Yep, delete, ignore. What’s needed to change all of this is a message that grabs the buyer’s attention early and makes them open to your solutions.

2 Procurement/purchasing

Then: Any sales person worth his or her salt knew that you had to avoid the numbers people to make any progress with the buyer. Don’t go to Procurement. Don’t go to Purchasing. These people were the “Doctor Nos” of new business, right? Every conversation started off with “No, we won’t do it.”

Now: Sales people heart procurement and purchasing. Nobody has a clear budget that doesn’t have to be approved by them or someone in the finance department. So you’re going to end up with them anyway. Learn to like it.

a Takeaway:

Figure out how to get them in the room early on. Better you should fight them in the bright white glaring light of the boxing ring, not the dark shadows assuring that you don’t see them coming.

3 Buying principles

Then: We would walk into buying principles’ offices and say, “Let’s start off with a blank piece of paper. Let’s talk about what your issues are, your pain, and what keeps you up at night.” In other words: “Customizing R Us.”

Now: Customization is a very bad word. It’s too much work, effort, and risk. Buyers have fewer resources, fewer people, and more responsibilities on the back of each person on their staff. To them, customization means you’re a more difficult solution.

4 First appointment

Then: Think of all those 10-year buyer/vendor relationships into which you couldn’t find a wedge. You tried and tried but couldn’t pry a crowbar under the door, no less blast it open with dynamite.

Now: Buyers who are working with tight money constraints and under pressure to be quicker and more efficient are interested in trying new methods to achieve exactly that. As such, they have to consider everything — including new vendors.

These are only 4 of the ways that the buying/selling environment has changed. I’ve included a table at the end of this e-book listing the [15 Ways Sales Have Changed Recently](#).



CHAPTER 2

Learning a New Language

IN CHAPTER ONE I PINPOINTED FOUR SPECIFIC examples of changes salespeople are facing as they try to “get in” to hunt a big sale.

Of course, the overall big picture has also changed. We tend to think of large companies as bulky bureaucracies that change slowly and incrementally, if at all.

In the same way that imminent execution is said to “focus one’s mind wonderfully,” the recent shift in the economic environment has forced businesses to do the same. The result is a sea change.

In other words, what has always worked doesn’t work anymore.

Let’s count some of the ways:

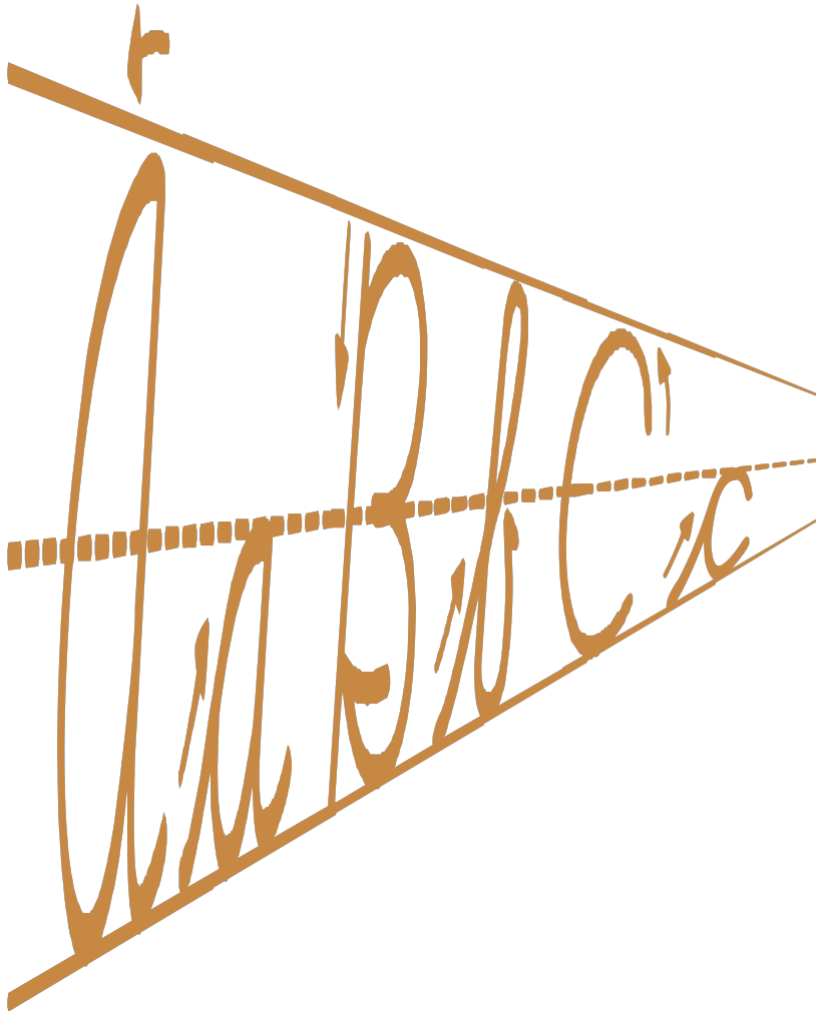
- a** Financial forecasts
- a** Issues
- a** Personnel management
- a** Profits
- a** Timeframes
- a** Expectations
- a** Operations

It’s not just sales professionals who have had to adapt to these things, executive buyers have also been forced to adjust to the new picture. They used to have budgets set in advance for those goods and service they would need. In those days you would go into their offices and say something to the effect of, “You’re buying X number of widgets from my competitor. You should buy those widgets from me now because:

- a** mine are better,
- a** I handle my inventory more efficiently, and
- a** they’re less expensive,
- a** I provide services they can’t match.”

Even more, you had the advantage of a “heads up” against any existing competition out there.

What all of this means is that you now have to use a different language.





The OLD LANGUAGE required you to speak in terms of:

- 1 All the advantages your product or service will bring to the buyers
- 2 Relieving their pain
- 3 All the special features you have
- 4 The superiority of your methods
- 5 The buyers' issues with former vendors

Right now, buyers aren't buying any of the above.

What are they buying?

The NEW LANGUAGE requires you to speak in terms of:

- 1 Time
- 2 Money
- 3 Risk

Buyers want their goods and services quicker, for less money, and with little or no risk. Period.

To do this, you have to think about your own business, figure out how you fit into that language, and talk to buyers in those terms.

Return On Investment

Remember when we used to calculate ROI as a part of our business case to a prospect company? You presented a 1-year or a 3-year ROI, and that was a business case that got people excited about what you were selling.

Those companies don't need a big ROI now. They just don't.

We think to ourselves, "Gosh, I'm going to save them 14-

20%.

They're going to want to invest in that." Sorry. Not true.

They're willing right now to make changes for smaller ROI, **as long as they can get it a lot faster**. You have to prove your ability to offer them the solution they're looking for. We can no longer depend on presenting our case in long-term language and expect it to win.

Everything is in flux. Since the old way of buying is not viable right now, how are buying decisions made? Glad you asked... Let's refer to what I like to call the "Decision Matrix." Essentially this is no more than a fancy way to describe the three key elements that affect how buying decisions are now being made.

The Decision Matrix

If we start with the understanding that, right now, the constraints of decision making are out of the end user's hands, then we need the following three elements to converge in order to present a successful sales proposition:

- 1 People involved in the buying decision
- 2 Business issue that creates a climate for change
- 3 Threshold Drivers— how much benefit comes to the buyers and how soon

That's the Decision Matrix.

Think back a couple of years. When you walked into a company to make a pitch, you could pretty-well predict that you would see a lot of the same **people** you saw last time you made a pitch. You already knew what kinds of **business issues** you would be addressing, and you had a clear presentation outlining your solution's **benefits to the buyers**. These things remained fairly consistent for companies from year to year. Now, however, changes in the decision matrix often occur once every one or two years.



Today the decision matrix is 60 days.

Put another way, one of these three things is going to change every 60 days:

- 1 People, 2 Business Issue, or 3 Threshold Drivers

People

The people in question are those that make up the buyers' table— all the people from your prospect's side, as well as from your own company, who will be meeting with each other along the way to a large deal.

In today's marketplace, you never know who will be at the buyers' table. But you can bet some of the following variables will be present:

- a Someone new to the company
- a Someone new on this particular job
- a Someone with responsibilities in addition to his/her regular job
- a Someone who suffers from fear and anxiety
- a Someone who feels immense pressure to perform
- a Someone with hope tinged with desperation
- a Someone who is completely against this sale

Maybe you'll have people who've only been on the job 14-30 days.

- a They're going to be interested in the benefits to the company
- a They may take your phone call
- a They may take the meeting

But they're going to wait until they get the lay-of-the-land before making a buying decision.

On a positive note, if you talk to people who haven't been in their positions long, you may find they have a lot of pressure to make a significant decision quickly. They could well be much more enthusiastic about talking with you than their predecessors were.

Business Issue

A business issue is the one or more things that *have* to happen for the company to be successful. And just like the people involved in a sale, the business issues driving any company have changed dramatically. Today the following kinds of business issues prevail:

- a They may be teaming up for an acquisition
- a They might be looking to merge with someone
- a They may be in the middle of a technology upgrade or transfer, or system conversion
- a They may need to increase their market share in a down market cycle
- a They may need to cut costs in premium freight spending
- a They may need to increase operating capacity in their current building

These types of business issues will ensure that their number one priority is met by a solution that's based on time, money, and risk. They're looking for ways to respond to circumstances in which they have **never** found themselves. It's also interesting to point out that the business issue is not simply raising prices or cutting costs. It's never that easy in a large company.

Buyers are very intent on finding a solution to what has been identified by the company as a business issue. You thus have to speak to that particular business issue or, quite frankly, they won't be interested in what you're selling.

For example, if everything is about sales generation and none of it is about cutting costs, don't bring in a solution that only cuts costs. You won't get the job.



Threshold drivers

Threshold drivers are those circumstances that turn interest into action, such as change in personnel or market forecasts. Drivers precipitate a buyer's decision to actually buy.

Most companies right now are setting a certain cycle time to result. And that's what drives their decision making.

It's not always immediately apparent, but listen for statements like the following:

- a** "I need to see cost reductions of 4% inside of the next quarter."
- a** "We need to see a headcount reduction of 1000 jobs by mid-year."
- a** "We need to see a lift in market share penetration of 2% in the next six months."

Those threshold drivers are the hooks that allow us to know whether or not we can meet them and participate in the decision matrix in a favorable way for our company.

Amazing but True

You're going to have the opportunity to visit new prospects every 60 days, or maybe the same prospect every 60 days, and each time they'll be in a different decision matrix.

Decision makers have moved beyond the times when their primary concern was whether or not you had a great product or service offering. With that in mind, you need to move beyond the traditional questions you're accustomed to asking, such as:

- a** How can I get them to understand?
- a** What would my best competitor be saying or doing right now?
- a** What are Apple, IBM, or other market leaders trying?
- a** What can I do differently?

None of these questions will get you a useful answer. What you need to ask, instead, is **WWJSD?**

What Would Jack Sparrow Do? (WWJSD?)

Think about the movie *Pirates of the Caribbean*. Jack Sparrow, the lead pirate in the story, was always in trouble. Therefore he was always looking for a way out. He sought to do something that no one would anticipate or begin to react to quickly. My personal favorite was when he attacked a government ship and waited until they had boarded **his** ship. Then he and his men swung over to the government ship and took off in it. He was absolutely 100% in every such situation. That was his decision matrix. So, the key takeaway here is to always have lots of ropes available.

Sure, maybe you don't have the same set of circumstances as you did in the past, but the pirate's attitude is golden and can be used to your benefit, as well as that of your clients.



Finding the Buyer

Who are your buyers? What do they want from you? What are the different scenarios that you should consider when preparing to speak or meet with them? And, most importantly, what has changed with your buyers lately?

Let's take a stroll down Memory Lane. Actually, you don't have to go all that far back. Remember all the talk, the books, the lectures, blogs, and so on about the idea that big companies get interested in your company because of your core or unique advantage? You arrived at the table with talking points on all these great things and more:

- a** Why you're better
- a** Why you're more nimble
- a** Why you're more cost effective
- a** Why you're easier to work with, and gee golly
- a** Why people just like us

All these advantages created a certain amount of excitement around the buying/selling process. Think fondly of those days. They are—at least temporarily—gone.

Today the overriding atmosphere around buying is one of fear, not excitement.

Fear

You know the fears created by the current world situation, but there's one other big fear that you might not have considered despite the fact that it has the potential to deeply affect your sales success (or failure):

Big companies fear **YOU**.

Now, you may be tempted to scoff a little and say, "How could I be scary? I'm just a small or mid-sized company."

And there you have it: you're a small or mid-sized company. You represent risk, and here are some of the risks you represent.





Top Ten Reasons You Scare Big Companies

- 1 Low resources.**
“Can you actually do the work?”
 - 2 Financial strength.**
“Will you be around for the next couple of years?”
 - 3 Lack of experience.**
“Do you understand how to work with a much bigger company?”
 - 4 Price.**
“Can you match economy of scale pricing?”
 - 5 No-brand/Low-brand.**
“Never heard of you before.”
 - 6 Conflict/Change.**
“Will my current vendors have to change their way of doing things? Will you cause us to change our systems—human resources, technological, financial, accounting, etc.”
 - 7 Work.**
“Will you force us to provide extra training for our people?”
 - 8 Risk.**
“Will you slow down our production time?”
 - 9 Exposure.**
“Will your company be able to handle emergencies quickly, efficiently, and quietly?”
 - 10 Failure**
“Will you do something to drive our customers away?”
- a Takeaway:** Try to pinpoint the exact fears a large company might have with you. What would scare you about you?

Four Fear Fighters¹

After you figure this out, you still have to figure out how to fight those fears. The “Four Fear Fighters” is a good place to start.

1 People

Let your buyers meet the people who will be implementing your solutions.

2 Process

Describe your processes and give them names. That might seem silly but referencing a process by name gives buyers a sense of confidence. It makes your process sound as if it carries weight within your organization.

3 Technology

Demonstrate your technological expertise if possible. Don’t just talk about it; show it. Remember that buyers buy what they can see and understand.

4 Experience

Cite your experiences providing this solution for the three problems you’ve outlined. Give references.

¹ Tom Searcy and Barbara Weaver Smith, *Whale Hunting: How to Land Big Sales and Transform Your Company*, John Wiley & Sons, Inc., Hoboken, NJ, 2008, p. 120.



CHAPTER 3

Buyers' Table

SO BUYERS ARE OPERATING IN AN ATMOSPHERE characterized strongly by fear. What's another indication of this? The buyers' table.

It's human nature to seek the opinions of others when you're making a big decision, like buying a car, house, or vacation. So it's natural for fearful business buyers to include others in the act of buying.

The buyers will bring in everyone who will have any part of the decision once it's made. They'll spread around the risk factor to as many as 4-7 other people. For any given deal, the following people might be part of the buyers' table:



a IT people



a Accounting/
Finance



a Human
Resources



a Operations



a Warehousing



a Subject Matter
Experts

The list could go on. The point is that you have to be prepared to deal with all of these different buyers.



CHAPTER 4

Deal with The Eel

IN EVERY DEAL, AND AT EVERY BUYERS' TABLE, there is an eel—a person who is against the deal.

Eels have a tendency to hang out in the shadows. They're hard to get to and they usually talk you down when you're not around.

The conversation may be innocuous...

- a** "I'm just concerned that we might be taking on too much right now with a change."
- a** "Let's bring this deal in after the SAP upgrade is completed."
- a** "Don't get me wrong, I think this is a great idea; I just wish we had the resources to support it."

Maybe they're against it on principle. Maybe they're your competitor's champion. Maybe they're afraid they'll be made to look bad if a new vendor is brought on. Or maybe they're just one in a list of curmudgeons who don't want to see change. Whatever the reason, be afraid. Be very afraid.

The eel has the power to kill you.





Warren Buffett on Poker

When Warren Buffett talks about poker, he says,

“Listen, if you ever sit down at a poker table and inside of three hands, you can’t figure out who’s the weakest player— who the others are planning on taking the money from— get up and leave. You’re the weakest person.”

You have to identify your eels and decide early on how to handle them.

Deal with Your Eel

Co-Op

Take their ideas and bake them into your solution.
Give credit liberally and frequently to your eel.

Pair them up

Find the person in your organization who speaks the eel’s language. Maybe they match each other in education, age or style. Whatever it is, this will create the friendly link for back-channel dialogue that will turn them, or at the very least, neutralize their negativity.

Containment

This is a combination of conceding all of this person’s small issues and points and then turning the conversation to the resolution of the bigger issues. You have to limit the scope of influence on your deal to items that are contained rather than allowing them to fester into deal-killers.

Find them another bone

Sometimes a curmudgeon wears out its welcome and its interest in a deal. Your job is to have enough knowledge about the company and its issues to refocus the eel on another part of the world that is not your deal.



CHAPTER 5

Threshold of Purchase: Why Do Buyers Buy?

IN THIS NEW ITERATION OF THE BUYERS' TABLE, you are undoubtedly going to be dealing with some people who don't know much about you and your company. It's important to know exactly why buyers buy.





Why Do Buyers Buy (or not)?

Point/Counterpoint

1 They know what they know.

That is, they know what they've seen on television or read in the *Wall Street Journal*. And they bring with them their education, experience, and background.

- a But they don't know enough.**
If they did, they would have already hired you.

2 You educate them.

You introduce your company. You talk about what you do. You bring them to a bigger awareness.

- a But they don't buy what they understand.**
"I understand perfectly what you're saying, but I don't think our company is quite like that. Our company is a little different."

3 You persuade them.

You've read the books, looked at the webinars, and listened to the podcasts about how to be more persuasive. And it seems to be working.

- a But they don't buy what they believe.**
"I agree with you. I know what you're saying. As a matter of fact, I'm probably a bigger fan of yours than you know. But I'll never get anybody around here to sign off on it."

4 They buy what they can sell and defend later.

As you're speaking with the buyer, he/she is envisioning a line of questioning that might take place three months in the future. They're being challenged about their buying decision: "Why in the heck did you buy XYZ? Why did we change over from the former systems to the new system? Do you have any idea how much trouble that's causing in my department? Do you have any idea how much additional expense there is?"

- a But they can't always come up with a good enough defense for your solution, so you need to teach and equip them with one.** You provide tools such as business case studies on paper, flow charts that show how you're going to reach the desired outcome and the desired benefit, all those kinds of pieces.

And then, they buy.

They know they can sell and defend this decision later.



CHAPTER 6

Merchandise Your Components

WHILE “CUSTOMIZATION” IS A BAD WORD right now, “packaged solutions” is a term that will be greeted with enthusiasm.

So how do you talk about packaged solutions?

Talking About Packaged Solutions

Here are some good talking points you’ll want to include:

- “Our approach to this problem is our XYZ solution.”
- “Our XYZ solution has a Phase 1, Phase 2, and Phase 3.”
- “These are the people who are involved.”
- “This is the technology that we use.”
- “When we did this as a case study with this other company, this is what they achieved.”

I know there are people out there thinking, “Tom, everything we do is custom. That’s one of the great advantages we bring to the marketplace.”

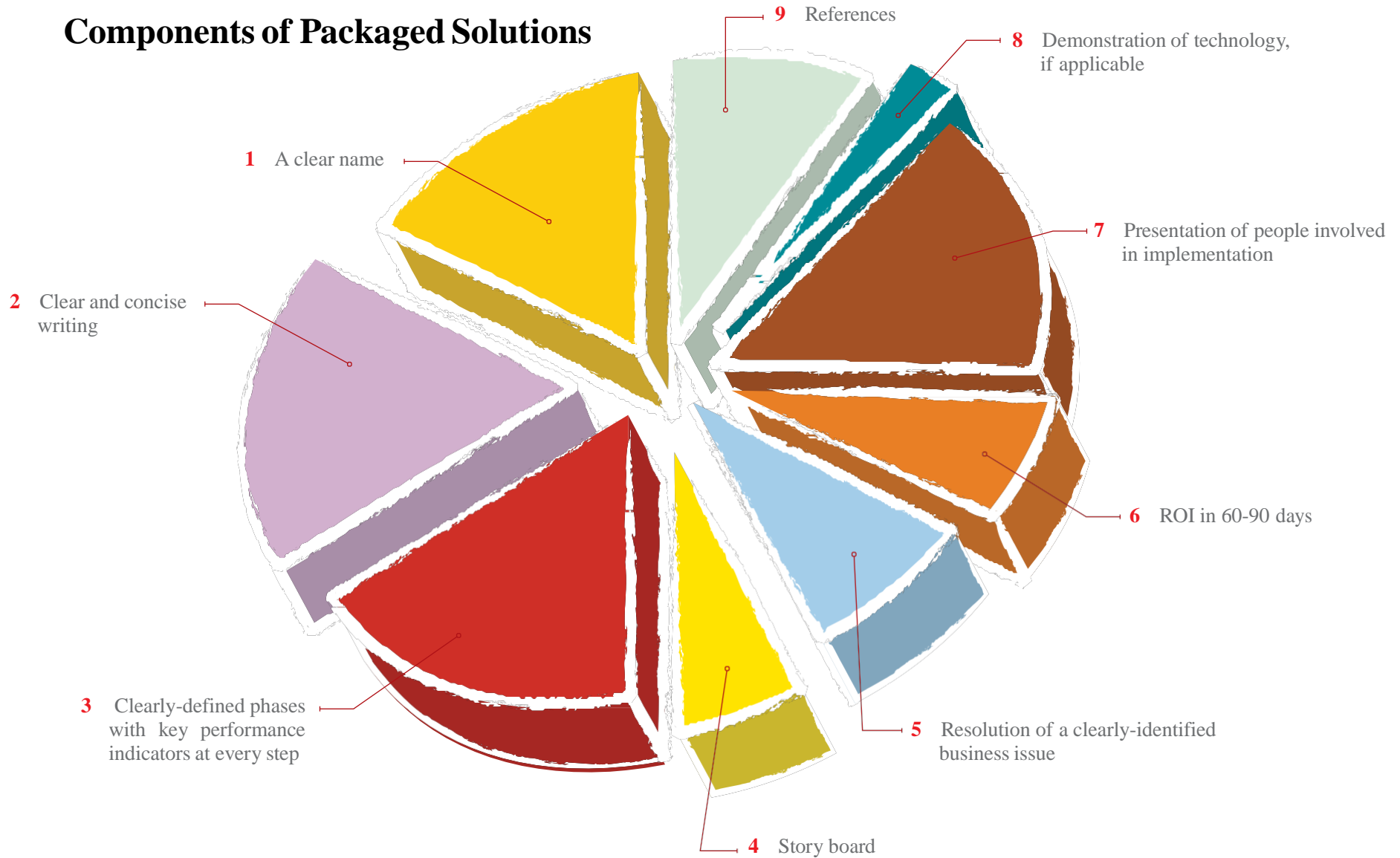
And my answer is, “I’m sure you’re right.” But I would also say you can merchandise components of your own customization process.

- a** Why not name and define your own upfront diagnostic process?
- a** Why not name and define the five steps involved in a customized design for your customer?
- a** Why not name and define how your implementation follows a rigorous set of quality control that you’ve put together?



It's not just that you're able to go ahead and merchandise the solution. You can merchandise the **creation** of the custom solution for those people who can only see and understand what they do in a customized way.

Components of Packaged Solutions





CHAPTER 7

Getting the Bigger First Purchase

WE FIND A LOT OF COMPANIES WHO ARE selling into the marketplace, and they talk about their result threshold, saying, “Okay, I can get you 20%, 30%, or 40%.”

But they don’t come back to their client and say, “Look, inside Phase 1 of implementation, what threshold do you need to achieve for us to move to roll out?”

Sample Phase-In to Roll Out

Phase 1

From interest in your company. **To** the first dollar spent by the client.

Phase 2

From first dollar spent. **To** 30% of full opportunity.

Phase 3

From 30%. **To** the end, which is 100% of full opportunity.

Phase 1: If you’re selling into a retail environment, buyers give you a prototype. “You’ll go to Florida, move into 10 of our stores and ‘Let’s see what you can do.’”

Phase 2: Once you get to the 10 stores in Florida and are doing well, they’ll say, “We’d like to see how you do in the whole southeast region.”

Phase 3: After you do well in the southeast region, they’ll say “We’d like to see how you do nationwide.”

I imagine you’re thinking, “How do I get customers to buy all three phases now? These are tough times. There’s no way they’re going to make such a large purchase.”

Remember the decision matrix? The components are people, business issue, and threshold drivers. In this case, your issue is with people.

The people who can buy for the 10 stores in Florida are only a subset of the people who are part of the decision matrix buying for the southeast. And they’re only a subset of the larger group that’s going to buy for the entire country.

Problem:

You wind up selling three times.

Solution:

Keep focused on your end point — 100% of stores nationwide.



Getting a Bigger Purchase

Tip 1

Always have a map that shows the full purchase, with performance indicators at every step, so you get from Phase 1 to the end without making two or three more sales.

Define your results threshold for rollout upfront. At each phase, what results do you need and what results do your customers need to make, so that you can move seamlessly through the phases?

Pull in the bigger buyers' table from the people who are going to be in the southeast decision making from the very beginning. If you don't, you'll get stuck.

Part of your team from decision #2 needs to be involved in decision #1 and so on. Make sure everyone understands that you're not in a "Try and see" mode. *We're not going to just try the 10 stores and then see what happens.*

This early phase is a way to calibrate and get yourselves oriented for the much larger rollout. And as long as we achieve this performance threshold, the rollout to Phase 2 is already guaranteed because we identified the results that allowed us to roll out.

Remember that many buyers may be in roles they weren't in six months ago. They'll feel more confident if you say, "Here are the industry key performance indicators that tell us you're going to be successful." Then follow them to the letter.

Tip 2

We have to help buyers make a bigger purchase by helping them understand that they can't get the results they want from the smaller purchase.

I was with a company recently in the far Northwest. They would sell an initial implementation — fairly complex engineering sales — and they'd sell almost any volume they could get.

The volume that would allow them to work out the kinks, really engineer the product, and work through the implementation, was 10,000 units. But the salespeople were allowed to go out and sell 4,000 units.

Well, you wanna know what the first 4,000 units look like? A mess.

During the first 4,000 they're just getting their supply chain management right. They're working through the orientation of parts in the inline manufacturing process. The first 4,000 units is where all the hard, bumpy work gets done. And if the buyers really wanted to know what the future would look like working with that company, the best vantage point would result from viewing it during the implementation of the **second** 5,000 units.

What's the critical mass at which buyers are able to understand what a larger future with you looks like?

Instead of selling 5,000, when you know that the only way for buyers to really understand your value proposition is at 10,000, you have to declare that up front.

Make sure you make it clear that "60% of final results are achieved after X amount of volume of purchase" (or whatever this statement is for you), and then show it. Buyers have to see what that ramped-in curve looks like so they will buy the bigger sale.



Getting a Bigger Purchase

Tip 3

Hunt heavy. Take people with you who match the buyers: IT for IT, operations for operations, finance for finance, etc.

Buyers want to spread the risk of your being a small company by having more people in the room from their company. Mitigate their fears by taking enough people with you to give them the confidence they need for the big sale.

Especially important right now is someone who can talk funding. That could be a board of directors member, your banker, or accounting firm. You want someone who's able to say you're stable and have long-term value. We've done this on several of our larger sales over time, and were amazed at what unsaid fear it took off the table for our prospects.

Tip 4

Make certain you're not the problem.

We have a client who, at one point in their careers, had a four-week negotiation on almost every single contract. That's not unusual. But the crazy thing was they were basically arguing about the same issues every time, and **they almost always conceded the issue.**

Stop.

Rewrite the contract.

Don't let yourself be the problem in the system.

Right now the decision matrix is 60 to 90 days. If there's a delay in the process of implementation, you'll get ½ way through, and the people will change, or the business issue will change, or the threshold drivers will change.

Then what will the buyers do? They'll put a halt to your project, and you'll lose the deal because you won't be far enough along to show them the results they want.





CHAPTER 8

Two-Card Questions—the Process Question

ONE OF MY GUILTY LITTLE PLEASURES IS watching Texas Hold 'em on TV. If you're not familiar with the game, each player has two hold cards. The rest of the cards in the seven-draw game are all face-up.

I've read that the biggest winners on Texas Hold 'em play the fewest hands.

They can tell from their hold cards whether or not they have a chance to win.

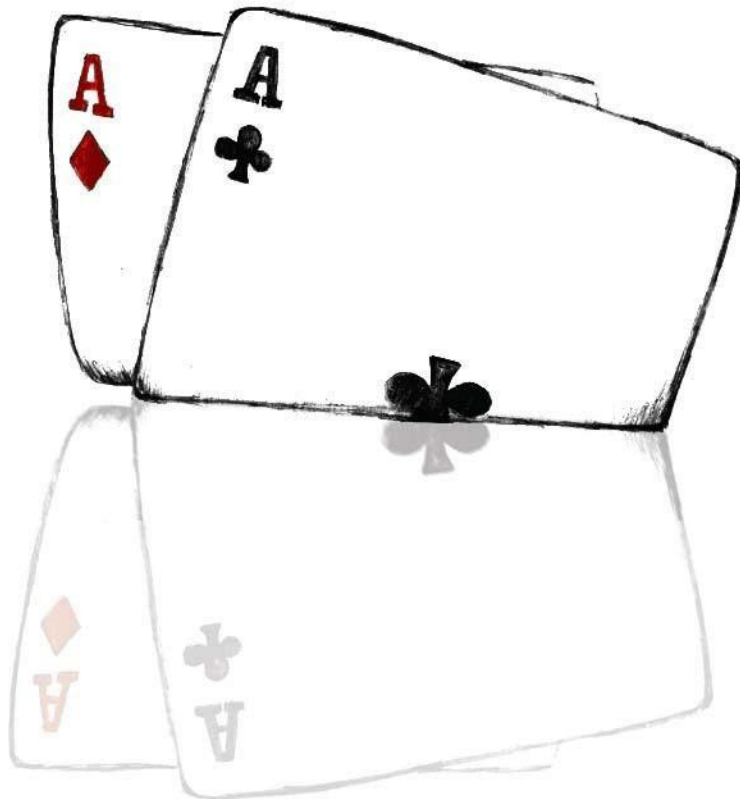
Too often we look at the money involved in a potential sale and the kind of work we're being asking to do as our precious hold cards. But they're NOT. Everyone around the table has that same information.

What you want is information that others do NOT have—information that transforms your hold cards into a pair of Aces.

So how do you get this information? Let me tell you a story.

A few years ago, I went with a client on a sales call. The potential buyer was a company at the top of the Fortune 400 list. Going into the meeting, we had the following set of facts:

- a** This was my client's fourth meeting with this company regarding this particular sale.
- a** It was potentially a very big sale.
- a** The meetings were always pleasant, but didn't seem to move us ahead.





I was tasked with trying to figure out if this sale was actually going to happen. So at one point, during a lull in the conversation, I stood up and went to the whiteboard that happened to be handy.

I said, “Let’s just gather a little information, and I’ll write it up here on the white board.

- a** “When you work with companies like ours, what is the normal first step in the process? Who has to be involved for this to be a ‘go’?”
- a** “How long does it usually take?”
- a** “What are a couple of big reasons some companies are disqualified at this step?”

Notice I didn’t ask for the whole process — just the first thing.

Immediately they said (and this was a shocker), “Sheila has to okay everything.....”

Well, we hadn’t met Sheila yet. That was our first clue.

Using a purely conversational style, I just kept on asking questions about each step.

Questions to ask at Each Step

- 1 Who is involved?**
- 2 How long will this step take?**
- 3 Why have companies been disqualified at this step?**

I wrote the answers down as we went. In a short time, we had the entire process up on the whiteboard, and we had made a discovery that was news to us — and to the buyers: They had never thought the process through nor considered all the side issues that any complex sale has. They also hadn’t considered that it would be 26 months before the first check would be written to my client. Finally, we learned that at one stage in the process, a third party had veto rights.

We decided, of course, not to pursue the deal. Had we not found out the process, we might have given them thousands of dollars in consulting **for free** and never made the sale.

If we had asked a general question about the process, we would never have discovered the vital information we needed. But asking questions in a conversational way, at the whiteboard, uncovered everything we needed to know.



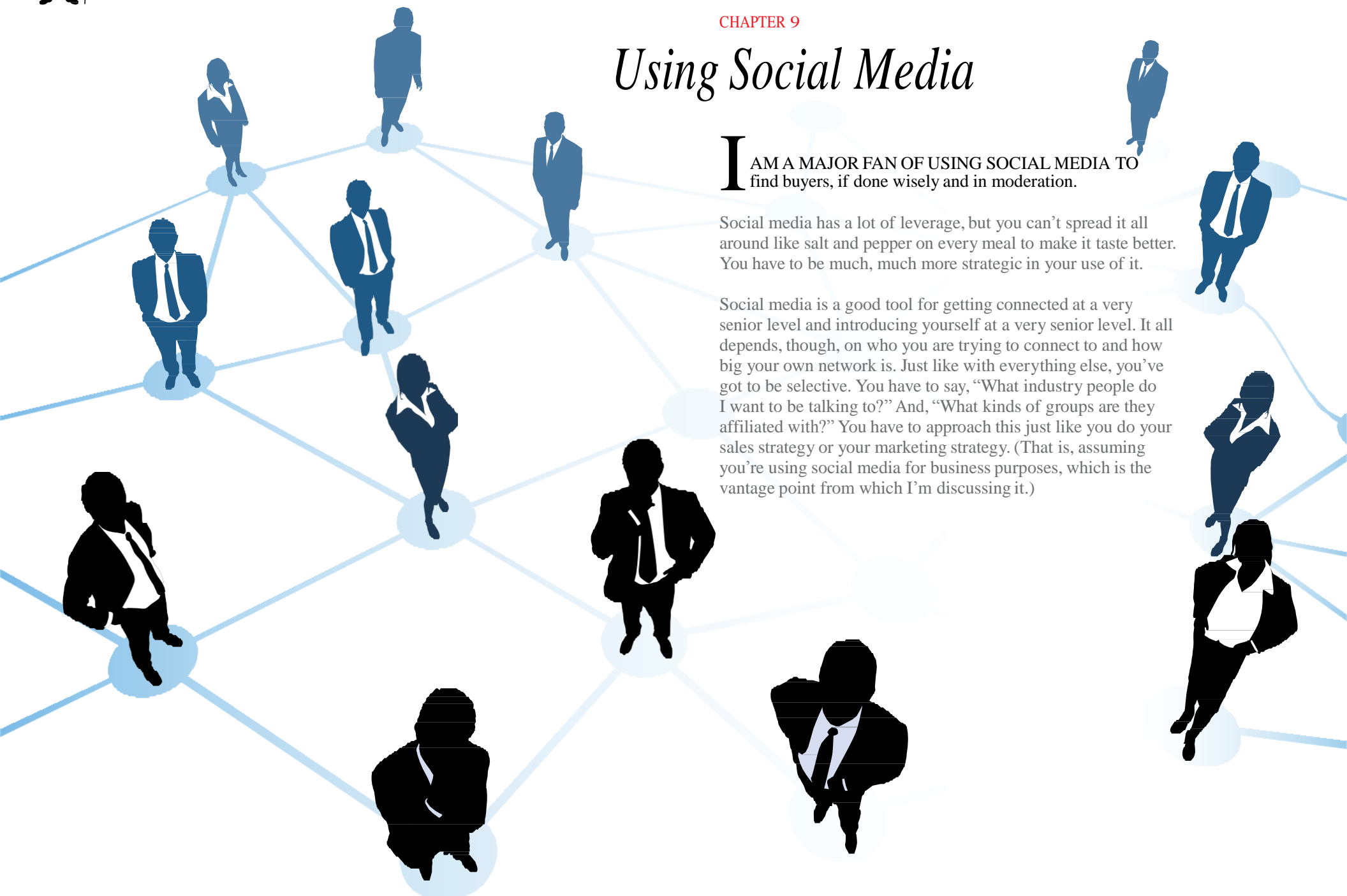
CHAPTER 9

Using Social Media

I AM A MAJOR FAN OF USING SOCIAL MEDIA TO find buyers, if done wisely and in moderation.

Social media has a lot of leverage, but you can't spread it all around like salt and pepper on every meal to make it taste better. You have to be much, much more strategic in your use of it.

Social media is a good tool for getting connected at a very senior level and introducing yourself at a very senior level. It all depends, though, on who you are trying to connect to and how big your own network is. Just like with everything else, you've got to be selective. You have to say, "What industry people do I want to be talking to?" And, "What kinds of groups are they affiliated with?" You have to approach this just like you do your sales strategy or your marketing strategy. (That is, assuming you're using social media for business purposes, which is the vantage point from which I'm discussing it.)





If you're not yet a member of any social media communities, I recommend starting with a site like LinkedIn that is specifically-created for executives.

According to Steve Hershberger, President of ComBlu and a chief advisor to LinkedIn:

- a The average age of the LinkedIn player is 42.
- a The average title is Vice President.
- a The average annual income is \$79,000.

This is not Facebook, this is not MySpace, and this is not Twitter. Each of these sites has a different demographic and overall function, and each was originally developed with personal use in mind (although many companies have been extremely successful leveraging themselves in each, and each company has welcomed businesses with open arms under differing circumstances). LinkedIn, on the other hand, was developed with the business networker in mind.

In LinkedIn, you're encouraged to showcase your work experience, write and receive testimonials from past colleagues or clients, link to your company's site or blog (and install rss feeds to the same), create groups of likeminded contacts, etc. There are also knowledge groups with which you can associate, and an "Answers" section that allows you to broadcast questions—whether provocative to stimulate conversation or genuinely inquisitive to generate feedback—to your network of contacts. Going in, just make sure to ask yourself, "What am I bringing to the table as far as expertise?" As with any business relationship, you've got to bring something to the table that will act as your coin of trade when others consider why they should connect with you.

The bottom line for all social media platforms is that they allow you to broaden your network of contacts. Social media is online networking at its finest, you just need to decide what kind of networker you are: buttoned-up (LinkedIn), casual (Facebook), or extremely open with your thoughts (Twitter). Maybe you're all of the above. Maybe you've graduated beyond these and have created your own network, or joined a private network created by someone else. Whatever you do, just make sure to do it with a reason and a strategy.

Messages that Penetrate

"So," you might ask, "in this new world where the buyers' decision matrix (people, business issues, threshold drivers) changes every 60-90 days, how can I possibly craft a message that will be compelling to buyers?"

We know that what compels buyers now revolves around **time**, **money** and **risk**.

This translates into the following:

- a Short returns on investment
- a Easy implementation with little resource commitment on their part
- a Risk management of mistakes and problems
- a Cost reduction or a lift in sales that can be measured in less than one-year cycles

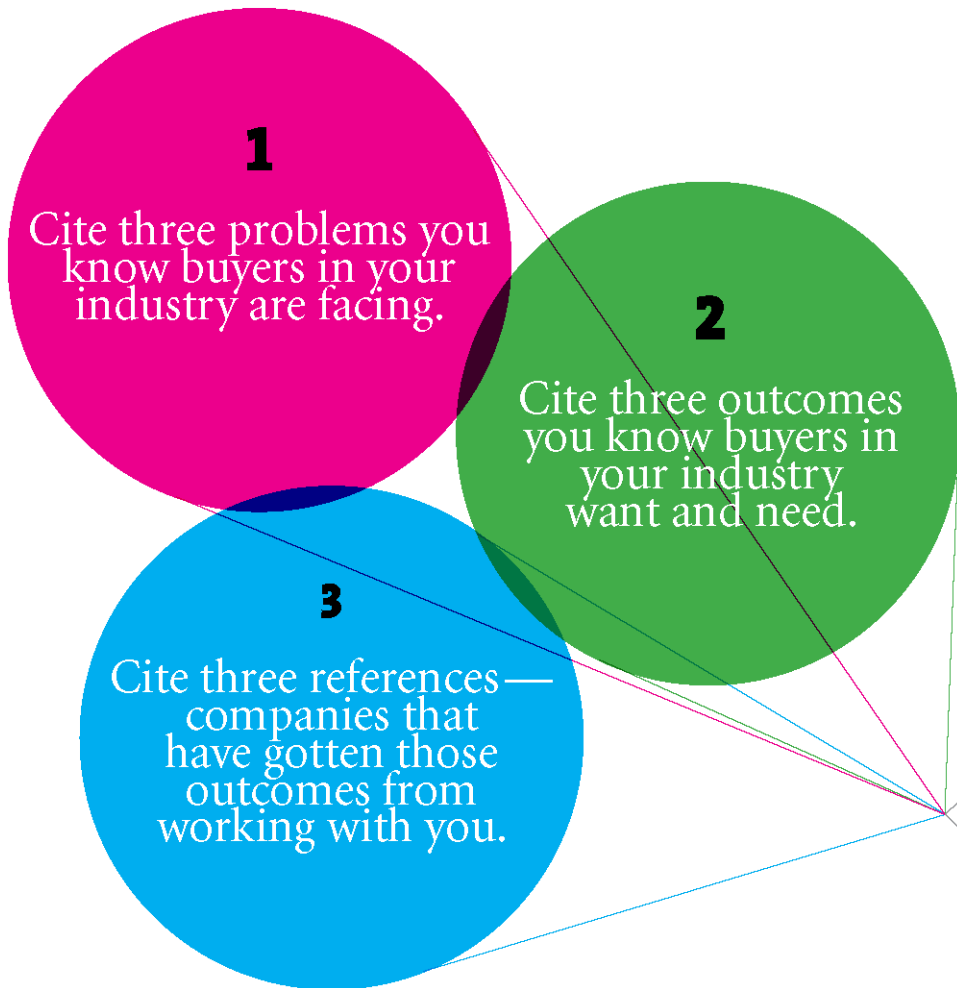
Many of the messages that have been pushed out into the marketplace, however, are still very "broadcast news" in nature—us talking about "**OUR features**" and "**OUR benefits**."

By doing this we're asking the buyer to translate that language into their language:

- a TIME
- a MONEY
- a RISK

CHAPTER 10

The Triples



ONE OF THE SOLUTIONS WE'VE DEVELOPED for the initial point of contact is what we call "The Triples". In this three-step method, the focus is completely on the **2TOS** **2ect-what** we know about *them* and *their* industry and *their* problems.

We used to have contracts that offered to do the following:

"Sit down with a blank sheet and see how we might work together."

"Take some time to get to know your company a little better and see what we can do to help *you*."

"Do an assessment of your current approach and see if there are ways that our services can improve them."

Prospects no longer have time, people, interest, or patience for this style of sale. They have issues that they need to resolve right now, and if you want to play, you have to step up in the initial conversation as an expert who can help them do that.

The Triples



Step 1

Define your target in that target's language.

You want to be able to call a prospect and say, "My company specializes in helping companies like yours." However, this statement has no credibility if you can't say what their company is like within this initial call. So, you need to say something specific about them:

- a** Industry specialty
- a** Size
- a** Geography
- a** Technology

It sounds like this:

"Hi, I'm calling from XYZ company, a specialist in HVAC and energy cost reduction, that serves big box retailers whose locations are larger than 140,000 square feet and who operate nationally."

This is a very specific and identifying way of speaking to the prospect. The initial reaction of the prospect is to say, "Is this me, or not?"

Step 2

Define what problems you solve for those specific targets in their language.

Too much of initial contact is based upon what you do, not what you accomplish on behalf of the prospect.

Senior leaders in companies are looking to eliminate their biggest fires and fix their thorniest problems. So our language is not the language of aspiration, but the language of consternation.

You want to pick out three problems that the companies who you have defined as your area of specialty are having. You're going to have to put yourself out there and tell them what you think those issues really are. The key to this is to focus on **time**, **money** and **risk**.

Keeping in mind The Triples, you're initial conversation with a prospect should focus on the problems you solve. For instance, "We help companies like yours, who are looking to:

- a** reduce overall energy spend by greater than 10%,
- a** secure regulatory and tax-incentive approval on "green" HVAC initiatives, and
- a** complete build-to-suit and retrofit new sites' HVAC design and installs ahead of schedule."

One important difference in this language is that it is specific—maybe even painfully specific—to the company and its industry. To secure the prospect's attention, you need to use numbers, best circumstances claims, and very tight language. If not, you will sound like everyone else in your industry and you will not gain their attention.



Step 3

Define what outcomes companies who have used you have achieved in their language.

Generic language such as “improved,” “better,” and “big difference,” are not as compelling as claims that have actual numbers, specific pressure points and the type of goal-wording that the prospect’s strategic planning initiative or bonus program have in them. So, you want to be specific.

“Working with companies like yours, we have produced key outcomes like:

- a** \$240,000 first quarter hard-dollar energy cost reductions,
- a** half-million tax credit on just three new facilities for green initiatives, and
- a** 97% on-schedule completion of over 300 HVAC installations in facilities over 140,000 square-feet.”

Again, specificity.

You don’t know if you can create these outcomes for this prospect, and you won’t until you meet with the prospect and do your initial meeting due diligence. However, these claims, and they have to be true— no embellishing or dishonesty here— are the claims that will pique the interest of your prospect and help you to secure the meeting that will tell both you and the prospect whether further investment of time and effort is warranted.

Step 4

Declare the companies who have achieved these results using you.

This can be a sensitive area. Sometimes you have to be careful because of confidentiality agreements or internal agreements you have to not talk about your customers (lest they show up on your competitor’s radar). Barring those limitations, I will say this: the most effective way to get the attention of big players is to drop the names of other big players.

It sounds like this:

“Companies like yours, including Best Buy, CostCo and Toys- -Us, have used us to achieve these results.”

When you’re specific like that, what you’re really asking for is the person on the other end of the phone to mentally raise his or her hand and say.

- a** “Well, that’s me. I have that problem.”
- a** “That’s me. I need that outcome.”
- a** “That’s me. I was wondering how that kind of company makes a good business decision.”

And that’s what generates interest.

And if they don’t have a “That’s me” response to the problems, the outcomes, or the references, that’s fine. You can step out of that conversation and come back 60 days later. As we’ve discussed, their decision matrix will have changed at that time.



CHAPTER 11

Prospecting the “*Hunt Big Sales Way*”

GETTING INTO CONTACT WITH A BIG PROSPECT is difficult enough, but getting them to listen to what you have to say is even harder. Fortunately, you have a lot more options for prospecting than you did in the past.

A decade ago, cold calling was one of the best (and only) ways to get in touch with a client, and I still frequently hear cold calling success stories from my clients today. However, what we have now that we didn't have in the past is a seemingly unlimited number of communication avenues courtesy of the Internet.

From email to social media to blogs to websites, not only are there more communication options, there are more ways of finding out about your prospects' companies and competition, as well as projecting their specific needs. So, why you may opt to make your initial contact with your prospect through a more traditional method, such as a phone call or email, you might consider using social media to at least “listen” to what the prospect's company is saying, what people in the prospect's industry are saying either about the prospect or state of the industry, and to find out more about your particular contact. This information will help you customize your message and the tone you use in your communications.





Social Media “Listening” in the prospecting process

Before blogs and social media came along, the majority of online content took the shape of one-way conversations—monologues controlled by the companies and people responsible represented by the content. Executives, legal teams, communications specialists, and PR professionals all made sure that the subject at hand was represented just so. Soon, forums and other modes of two-way conversations emerged, giving online audiences a voice—a very loud one at that. Now, since social media platforms have become some of the most trafficked online outlets, there are very few limits to the opinions expressed and the information available. You just need to know where to look for it.

“Listening” to social media is not much different from conducting standard online research. In fact, you should start with Google’s blog search engine (blogsearch.google.com), or another blog-specific search engine like Technorati, to identify blogs discussing topics that pertain to this particular buyer. You might even find information about a specific problem they’re facing, which would help you craft your message to focus on how you can help solve that problem. Make sure to check readers’ comments to gain insight on how they’re perceived in the market. Also, check the company’s website to see if they have their own blog. Are there comments? Do they respond to them? Information like this can give you insight into the company’s culture, which can help you shape the tone of your message (i.e. casual or formal).

Twitter is another great platform for finding candid and unedited commentary that might not otherwise be made available by the prospect company. A good way to start is by going to a Twitter search engine like Summize.com and putting in key words or names you’d like to learn more about. Unlike other social media platforms, you can read peoples’ updates (“tweets”) even if you’re not following them. This information alone might be helpful to you. However, it gets better. If you find someone who might be able to give you more insight into a particular client, you can follow up with them directly either through Twitter (remember: conversations are public if the person is not following you) or by email (this information may or may not be available on their public profile).

If you’re already active on Twitter, Facebook or LinkedIn, you can pose questions to your networks (either to the entire network or to specific people within it) to find out more about specific subjects.

I actually have an advertising agency client who was getting ready to pitch a huge pharmaceutical company for brand campaign for one of their cancer drugs. In his quest to find personal stories from people who suffer from this particular cancer, my client sent out a broad query to his Facebook and Twitter networks. Along with a bunch of messages from worried friends, he received a long private note from a past colleague who worked for the pharmaceutical company’s incumbent agency, but who would be involved in the same pitching process as my client. Not only did he give him information about the drug and background on the cancer, he told him all about his agency’s plans for the pitch. My client didn’t have the heart to write back and tell his past colleague that the reason he was asking is because he, too, was pitching that company. (And in case you’re wondering, as of this writing, we don’t yet know who won the account.)

Of course, you may just decide that the best way to use social media is to get in touch with your prospect(s) directly. I’m a big fan of this approach so long as it’s done thoughtfully and strategically.

For some best practices on using social media in the prospecting process, please see the table on the following pages.

And finally, for those who are still trying to identify prospects within a certain industry or who have a certain problem, the above listening tactics should prove to be similarly helpful.

How to Use Different Communication Platforms in the Prospecting Process

The downside of having so many avenues available to us is that it's often difficult to figure out which one is the best to use in any given situation. However, if you're using the exact same approach with every prospect, you're likely decreasing your success rate. You have to remember that each prospect is different from the next, and if you do your social media listening and research upfront, you'll have an infinitely better idea of which approach you should use in each case. Of course, if you're still at the stage of identifying and qualifying your prospects, you'll want to use completely different tactics

The following table offers usage suggestions and best practices for several different popular avenues (although there are many others out there). No matter what avenue you ultimately choose, just remember to keep The Triples approach in mind once you've initiated a conversation.

Email

Uses

- To identify and filter potential prospects (via a mass email campaign to a targeted audience list)
- Initial contact
- Follow-up after initial conversation via social media, phone or physical introduction
- Reach several members of a specific audience at once (via a mass email campaign to a targeted audience list)
- Offer information (upon request)

Best Practices

Whether you're writing a customized personal email to one prospect or reaching out to several potential prospects via an email marketing campaign, make sure you:

Address the prospect by name — his goes without saying for a one-on-one email, but mass email blasts often don't afford you the same luxury. If the list of prospects you're emailing does not contain first names, use a general greeting such as "good morning" and then make sure to use the word "you" in the first sentence. For some reason, many people are tempted to start mass emails with some type of philosophical statement about the state of the market or industry (i.e. "In these tough economic times, companies have to streamline their process")-don't do this. This is a dead giveaway of a mass email sent by a lazy marketer or sales person. If you treat the prospect like a number rather than a person, they'll return the favor and delete your message without reading it.



— Email

Best Practices
(continued)

Keep it brief — people are busy and simply won't read long-winded emails, especially from somebody they don't know.

Don't include a list of services or a bunch of "we do" information unless requested.

Speak in terms of the prospect's needs, rather than your capabilities. For instance, "Companies like yours often see a 30% increase in sales after optimizing their website for popular keywords and search phrases" is a lot better than "We are search engine optimization experts."

Establish yourself as an expert and trusted source (*rather than just another sales guy*) by offering a link to a free resource that addresses one of the problems you've identified for their industry. This can be a link to your company blog, an e-book, white paper, webinar or podcast hosted on your site, or an article published online.

Do not include an attachment of any type unless requested.



Uses

Initial contact (Cold Calling)

Follow-up

Best Practices

See "10 Steps for Cold Calling Success in the Index at the end of this e-book?"



LinkedIn

Uses

- a Listening and Research
- a Identify and filter prospects
- a Make new contacts
- a Establish credibility and expertise

Best Practices

- a **Display relevant experience and recommendations.** Because LinkedIn is often the first thing people see when they google your name, you'll want to make sure your profile is impressive and accurate.
- a **Update your status with interesting information, announcements, and/or a link to helpful resources.**
- a **Request an introduction to a hard-to-reach prospect.** What LinkedIn is really great at is illuminating the idea of six degrees of separation. Chances are that if you have a large enough network, one of your contacts will know the prospect you're going after and can make an introduction for you.
- a **Survey your network.** Using the "Answers" section, pose questions to gain personal insight not available through traditional outlets. (Make sure to keep questions broad so that your prospects don't think you're a stalker, and provocative so that they'll demand a response.)
- a **Send notes to your network** when you have new resources available that might be helpful to them.
- a **Display thought leadership information for your network.** This can be via an RSS feed to your company site or blog, or a link to your company's online resources.
- a **Create a group that will interest your prospects.** Many people create company-branded groups, which are good for internal morale and visibility, but not as good for prospecting. While your contacts might accept your invitation to join a company group, it's very unlikely that they'll ever return. After all, what's in it for them? Instead, create a group for "Expert Manufacturers" or "Pro Retailers" that will attract a broad audience. Also, make sure to update content frequently.
- a **Write and request recommendations for/from past colleagues and clients.** Receiving recommendations adds to your level of credibility, while writing them raises your visibility in other peoples' profiles. (Not to mention, it's just a nice thing to do.)
- a **Check out your prospect's profile. See what they're talking about/what interests them.** Obviously.



LinkedIn

Uses

- a Identify and filter prospects
- a Initial Contact
- a Listening and research to gather helpful information about the prospect's industry, problems and reputation
- a Create a more casual dialogue
- a Establish credibility and expertise
- a Strengthen existing relationships

Best Practices

- a **Be well-rounded.** Even if you're using Twitter purely for prospecting, don't just talk shop. Share observations, links to interesting articles, and tidbits about life to establish yourself as a multi-faceted person rather than a tunnel-visioned sales guy.
- a **Link to thought leadership materials** (either your own or that of someone who isn't in direct competition with you).
- a **Provide frequent tips, pointers and ideas to establish yourself as a thought leader and increase your followers (with people who find benefits in your solutions).**
- a **Remember your audience.** Don't send out hundreds of updates a day. Not only is it annoying, you'll end up taking up their entire first page which will drive them to potentially block you.
- a **Don't be the boy who cried "wolf."** Sending out tons of filler, fluff messages decreases the chance that people will pay attention to the important ones.
- a **Comment on interesting tweets.** People like to know that they're being "heard." If you read something interesting, respond with a public "@" message or via a direct, non-public message. Just make sure they know which tweet you're responding to.
- a **Retweet interesting or helpful tweets.** If somebody puts up a tweet that you think would benefit your network of followers, resend it in your own words and give credit to the person who sent it originally by adding @theirusername in the tweet.
- a **Search for keywords and phrases.** Using search.twitter.com or Summize.com, you can "listen" in on conversations about your topic of choice. Not a shabby way to do research and get the inside scoop on that prospect you've got your eye on.



facebook

Uses

- a Listening and research
- a Create a more casual dialogue (after initial contact with prospect)
- a Strengthen existing relationships

Best Practices

Because Facebook was designed to extend and support social relationships, there are certain things that fly and others that are off limits:

- a **No blatant sales pitches** — many people hold their facebook accounts sacred and use them primarily as a platform to keep in contact with friends. If a prospect has added you as a friend, act like one. This is not the place for business speak unless, of course, it's initiated by the prospect.
- a **Don't spam users with hundreds of updates** — the worst offenders of this are those who have synced up their Twitter updates with Facebook. Thus, if they're sending out multiple updates on Twitter, they're doing the same on Facebook. This is a known offense.
- a **Keep updates subtle** — especially if they're work-related. This follows the same logic as the “no blatant sales pitches” rule.
- a **Be well-rounded.** Because of the social nature of Facebook, this rule applies even more here than it does on Twitter. Also, your network here is likely to be composed of more friends than business contacts here, so balance your updates with a mix of work and life to establish yourself as a multi-faceted person rather than a single trick pony.
- a **Use it how it's supposed to be used.** People who get on Facebook purely for business reasons often overlook those things that make Facebook so popular: photos, interesting updates, personal information, etc. If you're going to do it, do it right.
- a **Offer helpful applications** (usually as part of a company-wide campaign)
- a **Link to your blog posts.**
- a **Survey your network.** Using either your status update to pose a question, or sending a note to select friends, you can use Facebook as a good resource for gaining personal insight often not available via traditional outlets.
- a **Link to your blog posts, press coverage and/or news articles you find interesting.** You're allowed to share your work-related blog posts and any press you receive — after all, both of these are part of your overall story.

Uses

- a** Identify and filter prospects
- a** Listening and research
- a** Initial Contact
- a** Research and listening to gather helpful information about the prospect's industry, problems and reputation
- a** Create a more casual dialogue
- a** Establish credibility and expertise
- a** Build new relationships
- a** Become part of a community
- a** Strengthen existing relationships

Best Practices

I left blogs for last because we have to distinguish between best practices for your blog, their blog & the blogosphere as a whole.

Your blog:

- a** **Don't just talk about yourself.** Where businesses go wrong with their blogs is using them as a platform for re-worded "about us" info. What you want to use them for is to build an accessible community of return visitors who visit because they know you offer valuable content.
- a** **Provide frequent tips, pointers and ideas to establish yourself as a thought leader and increase your followers (with people who find benefits in your solutions).**
- a** **Make yourself accessible.** Again, many companies mistake the concept of "being accessible" with making their "About us" information more accessible. In other words, they talk about what they do in a more casual manner, but it's still no more interesting than it was on their website. Instead, make sure you talk about relevant events and anecdotes that take place outside the work place. Sure, these types of posts might (and actually should) circle back to an industry-related conclusion, but at least they're entertaining along the way.

Best Practices

- a Respond to readers' comments.** This goes back to the idea of building a community. Make people feel comfortable reading your posts. Hopefully they'll refer you to their friends. Blogs are often top drivers of traffic to corporate sites, so the more the merrier.

Their [the prospect's] blog:

- a Get to know their personality.** This is especially true if your prospect is the one directly responsible for the blog. (And if that's the case, it's probably safe to say that cold calling isn't the best way to make your initial contact— they've moved beyond this method.) If the blog is not written directly by your prospect, but rather someone else at the prospect company, you can still get a great idea of the culture.
- a Comment on interesting posts.** You might be thinking that the best way to comment on a post is to actually incorporate a “hey, I read your post and thought you'd be interested in hearing about my product,” intro into an email you want to send. Be patient and establish a dialogue. Also, be interesting so that they'll want to engage further.
- a Show that you've done your research.** So, you've left the comments and have tried to establish a dialogue, but it's not panning out into a beautiful offline relationship. Now, it's time to make formal contact with the prospect. This is where you can display some knowledge about the company by referencing a blog post, but be subtle about it unlike the tactic mentioned in the example above.

Blogosphere: The blog universe is constantly under fire for having no editor, but this is exactly the beauty of it!

- a Research and listening.** Like the other social media platforms out there, blogs offer a plethora of unedited commentary about your prospect, their industry and the consumer consensus on both.
- a Take note of the new, casual type of interaction taking place.** You can deny its existence 'til you're blue in the face (trust me, I tried!), but a casual revolution is taking place whether you're a part of it or not.

So, bottom line: try something new and only use stodgy messages with stodgy prospects— those who aren't a part of any of the social media platforms named above.

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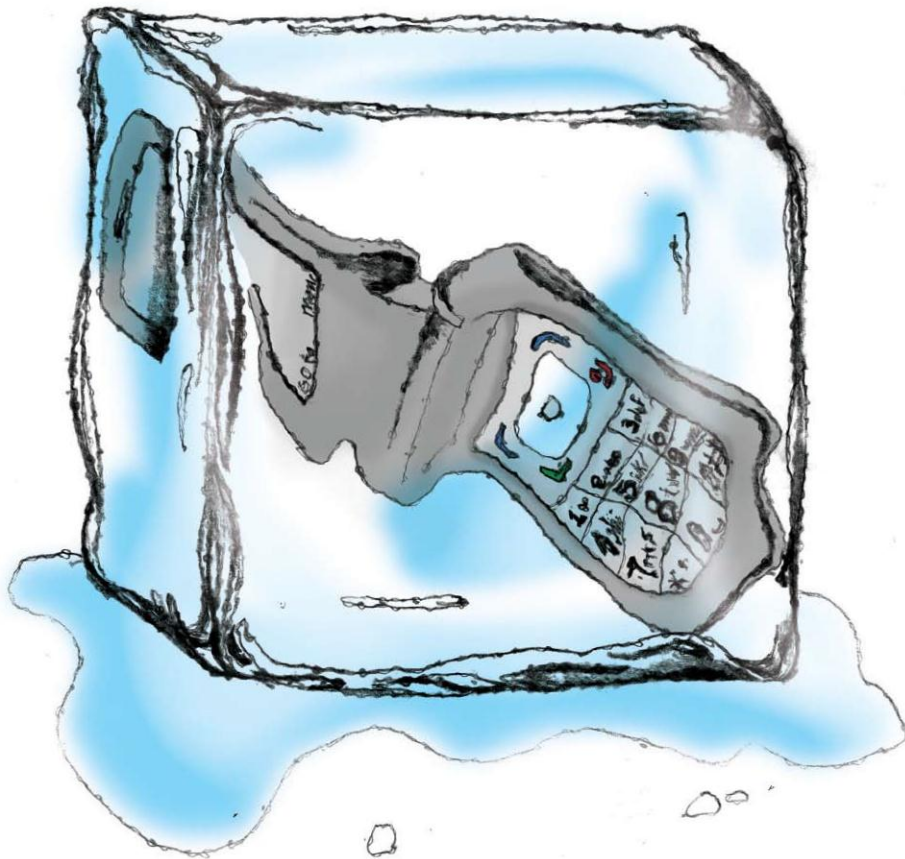
15 Ways Sales Have Changed Recently

| | What "Used to Be" | What "Is" |
|-----------------------------|------------------------------------|---|
| 1 Gatekeeper | Secretary/as sistant | Voice mail/email |
| 2 Procurement/purchasing | Always avoid | Must be involved |
| 3 Buying principles | Customization | Commodity |
| 4 First appointment | Hard to get | Easier to get |
| 5 Budget | Had a budget | No budget |
| 6 Language | Features, benefits, pain, problems | Time, money, risk |
| 7 Return on investment | 1, 2, 3 years ROI | 60-90 days ROI |
| 8 Change in decision matrix | 1 or 2 years | 60 days |
| 9 People | Low or moderate turnover | High turnover |
| 10 Business issues | Focused on growth | Focused on survival/maintenance Hopeful for growth |
| 11 Threshold drivers | Cycle time of 1-3 years | Cycle time of 60-90 days Problems, |
| 12 Message | Do whatever it takes | Outcomes, References Reps from all affected departments Fear |
| 13 Buyers' Table | Few people, or one-on-one | Social media |
| 14 Buying Environment | Excitement | |
| 15 Initial Contact | Mail, phone, meeting | |



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10 Steps for Successful Cold Calling²



COLD CALLING IS ALWAYS DIFFICULT. BUT RIGHT NOW, more than ever, it's well worth the effort because the chances of your getting that first call or appointment are greater than in the immediate past.

At Hunt Big Sales, we've developed a series of 10 steps for successful cold calling. We know that the first gatekeeper is probably voice mail, so we give you a sample script to follow.

Start with The Triples that we developed earlier, and state the three problems in the first call you make.

Step 1

When Day 1

Action First call

Sample "Hi. I'm calling from XYZ company, a specialist in HVAC and energy cost reduction serving big box retailers whose locations are larger than 140,000 square feet and who operate nationally. We help companies like yours who are working on the following three key areas:

- 1 reducing overall energy spend by greater than 10%,
- 2 securing regulatory and tax-incentive approval on 'green' HVAC initiatives, and
- 3 completing build-to-suit and retrofit new sites' HVAC design and installs ahead of schedule. "I'll call again tomorrow at 9 a.m. I hope to talk with you then."

You Do Not leave a phone number. You are going to establish trust by doing what you say you are going to do.



In the second call, introduce the outcomes you can deliver. Be certain to make this second call at the exact time you said you would.

The third call finishes the Triples by giving the buyers names of your references.

Step 2

When Next day (promised time)

Action Second call

Sample “Hi, I’m calling from XYZ company, a specialist in HVAC and energy cost reduction serving big box retailers whose locations are larger than 140,000 square feet and who operate nationally. Working with companies like yours, we have produced key outcomes such as the following:

- 1 \$240,000 first quarter hard-dollar energy cost reductions,
- 2 Half-million tax credit on just 3 new facilities for ‘green’ initiatives, and
- 3 97% on-schedule completion of over 300 HVAC installations in facilities over 140,000 square feet. I’ll call tomorrow at 9 a.m. and hope to talk with you at that time.”

You Do Not leave a phone number.

Step 3

When Next day (promised time)

Action Third call

Sample “Hi. “Hi, I’m calling from XYZ company, a specialist in HVAC and energy cost reduction serving big box retailers whose locations are larger than 140,000 square feet and who operate nationally. Companies like yours, including Best Buy, CostCo and Toys-R-Us have used us to achieve these results. Please give me a call back at ____so we can talk about your needs. Thank you.”

You Do Not leave an email address. It is too easy for someone to blow you off by email.

At this point in the 10-step process, our clients report about a 40% call back rate. Right now, with the economy what it is, we’re recommending our clients consider what we call “3 taps and out, 2 months and back.”

You’ve made your 3 taps at this point, and your wisest course may well be to wait 2 months and go back. The customer’s decision matrix will have changed by that time, and you might be talking with a different person entirely. Or some other change will have most likely taken place. In 60 days the world will have changed.



Step 4

When Two days after third call

Action 4th call

Sample Leave a similar message to the third call and again leave your voice mail number.

You Do Not leave an email address.

Step 6

When Same day as fifth call

Action 1st email

Sample **You Do:** Send the buyer the facts, figures, and most importantly, the testimonials you have that demonstrate you know how to help them.

Step 5

When Two days after fourth call

Action 4th call

You Say “Hi. I will be sending you today an email with some facts and figures showing the ways we have helped other companies achieve their desired outcomes in the marketplace. I’m sure you’ll see the long-term benefits of working with us.”

You Do Not leave an email address.

Step 7

When Two days after fifth call

Action 6th call

You Say: Leave the company name and phone number, but mention that “timing is always important, and for that reason I will put you in my tickler file to contact again in about six months.”



Step 8

When Two days after sixth call

Action 1st mail

You Do: Send buyer a packet about the firm including your card and mentioning “if you need anything, please feel free to call.”

You Do Not: Do not call. Do not email.

Step 10

When At six months

Action Exit

You Say or Do: File this prospect away for review in 90 days.

You Do Not call. Do not email. Do not mail.

2 “10 Steps for Cold Calling,” The Whale Hunters LLC, 2008, all rights reserved.

Step 9

When Six months later (or earlier)

Action Drop by

You Do: If you are in the area, drop by and see them, referencing all of your voicemails and other communication: “As you can probably tell from all my calls and notes, I am really interested in meeting you.”

You Do Not call. Do not email. Do not mail.



We have found this process remarkably effective as we have used it with our clients and also heard their stories of success with it.