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Beyond Technology: Key Overlooked Essentials

By Bruce Wedderburn

Your sales people still need to have conversations with customers.

A new sales or business technology surfaces almost every day and its creators claim it will empower our businesses and help us blaze a trail to the 22nd century. Perhaps you recognize the promises for turn-key, mission-critical, real-time, innovative, client-centric, mobile, value-driven, globally-powered, collaborative, cloud-based, business insight solutions to empower your enterprise in today's competitive business environment during these uncertain times.

Whew!

Yet an inconvenient truth is often overlooked in all this onrush of technology: No matter how many customer relations management (CRM) systems, apps, tools, plug-ins or dashboards your people have at their fingertips, three realities are more true than ever:

1. Your sales people still need to have conversations with customers.
2. The quality and quantity of those customer conversations will determine, more than any other factor, the degree to which your opportunities and revenues advance.
3. The quality and quantity of those customer conversations will also determine, more than any other factor, the ROI from your technology investments.

What are the key indicators that your sales people are maximizing the quality and quantity of their customer conversations?

What are the key indicators that your sales people are maximizing the quality and quantity of their customer conversations? Let's look first at quality, and three powerful questions that managers can ask, and coach to for each key opportunity their people are pursuing.

Does the sales person, and the customer, both clearly understand the customer's challenges and needs?

We have determined there are five categories of needs that your customers may have. The more that you can collaboratively help your customers think through these five categories, the more that you are elevating yourself, your company and the value that you can provide in your customer's eyes. The five categories are:

- **Current Situation –** The level of satisfaction or dissatisfaction that your customer has with the current situation.
- **Desired Situation –** Your customer's goals and outcomes.
- **Risks or Consequences –** Potential challenges your customer might experience if they stay in the current situation.
- **Benefits or Rewards –** Improved outcomes your customer may receive, both personally and professionally.

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- **Urgency/Importance –** The reasons why the customer may be looking to change now, or possible downsides of delay. How effectively are your sales teams capturing and documenting this valuable client information?

What commitments are you getting from customers at the end of each meeting that will move the opportunity forward?

That is, what is your customer doing to advance the sale? Is it a specific action or a vague statement? "Call me in three months" or "Send me a proposal" are unspecific comments that puts the responsibility all back on the sales person. There is no commitment to action on behalf of the customer.

Does the sales person know who is on the decision team, and what role their key contact will be playing?

Too many opportunities are "single-threaded," with proposals and presentations being delivered to only one person or one department, without having a clear understanding of how the decision will be made and by whom. The sales person may have a good relationship with a clinical buyer in a hospital, but now other buyers in finance and procurement are increasingly involved in the decision team, and can derail even the best clinical proposal.

> For most salespeople, these conversation skills require practice, coaching and reinforcement to become habitual.

If you want to ensure that the information that goes into your CRM or pipeline management tool is accurate and able to help close opportunities, then build a sales organization that is able to gain answers to these three important questions. The answers will help your salesperson and his/her manager to collaboratively formulate next-steps that support your customer in the best possible way and increase your chances of winning the deal. It will avoid the dreaded "garbage in, garbage out" curse that minimizes the promise of so many CRMs.

Here's the key takeaway in all this: Gaining these insights requires a degree of skill in planning and conducting a customer-focused sales conversation with a range of buyers involved in the decision. It is *the* essential sales capability. It's all about the conversation! For most salespeople, these conversation skills require practice, coaching and reinforcement to become habitual.

Few people doubt that the efficiencies that new technologies are delivering to businesses and individuals have immense potential. In many cases that potential is being realized and organizations are managing their sales and businesses with much greater precision than ever before.

I applaud that and hope we continue to evolve from the subjective guesswork of yesteryear. But in order to maximize these exciting new technologies, the fundamental conversation skills of salespeople must be front and center. It's all about the conversation. ■

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