Customer-Focused Selling

Sales Huddle Resource

CFS Sales Huddles

This tool contains resources for sales management in working with sales professionals to develop their Customer-Focused Selling skills and generate increased sales results. For most people, the continuous reinforcement of these skills is important for them to create long-term change and skill improvement.

The Sales Huddles are clustered into the five areas of the Customer-Focused Selling process, they include:

1) Open
2) Investigate
3) Present
4) Confirm
5) Position

Each skill area contains 8-10 Sales Huddles. The Sales Huddles are designed to be delivered in 10-15 minutes as part of a coaching conversation either face-to-face or on the telephone. The objective is to reinforce each skill area through a variety of thought-provoking business applications.

Sales Management Delivery Tips

- Focused skill development on one CFS area for several weeks (30, 60, or 90 days) tends to yield the best return.
- Consider the person's SSAT results as you determine what skill to begin with.
- Keep in mind that the skills are progressive from left to right (Open first, then Investigate, then Present, etc.)
- Our statistical research shows a strong correlation to the Investigate component of CFS and actual sales results – often a good place to start.
- Pose each Sales Huddle as a "challenge" or "experiment" for the week; ask the participant to report on the results of the challenge/experiment.
- Remember that learning is a process and adults learn best with business application and debriefs.

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CFS Sales Huddles: Open

Key skills to reinforce in the Open area of the sales process are:

- Adapting to Social Styles
- Setting the verbal agenda, including the following four components:
    - Their world (Tell them in order for you to provide them with what they want, you would like to ask them some questions)
    - Your world (Let them know you'll be telling them about your solution)
    - An invitation (Ask if there's anything they want to add)
    - Next steps (Check that they are ready for you to ask questions – ask permission)
- If the prospect/client is not clear about your company, you can do a one-sentence mini-presentation to bring them up to speed

Suggested assignments

- Identify the most "challenging" Social Style for you to interact with and write two strategies to prepare effectively for this style.
- Identify the most "comfortable" Social Style for you to interact with and determine two strategies for remaining professional vs. becoming overly friendly.
- For one full day or week, track the number of different social styles you talk with; check yourself to see if you able to identify a cross-section of styles.
- Analyze situations that include conflict or awkwardness and determine the back-up style contributing to the behavior.
- Based on the conflict or awkwardness, predetermine your best course of action for each Social Style.
- Write on a 3x5 index card the specific verbal agenda to use on calls, including the four components.
- Practice saying your verbal agenda to five different people.
- Note your verbal agenda on a yellow pad and use it as a guide during your calls.

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CFS Sales Huddles: Investigate

Key skills to reinforce in the Investigate area of the sales process are:

- Asking Investigative questions
- Balancing between open, closed, and Investigative questions
- Listening effectively
- Giving a verbal summary

Suggested assignments

- Write a list of 8-10 Investigative questions (must begin with describe, tell, share, explain, explore, or help me understand).
- Select one Investigative question and commit to asking this in prospect/client meetings for one full week or month; report the findings.
- Select your top three Investigative questions and note them on a yellow pad; test them on a variety of calls to determine how interchangeable they are and what outcome each creates.
- Listen/observe a partner's sales call and track how many closed, open, and Investigative questions are used in one conversation. Comment on your observations of the impact that the mix of questions had on the call. Have your partner reciprocate and listen to/observe you.
- Determine why the prospect/client is talking to you by using Investigative questions.
- Attend a new business or client meeting; write the top 3-5 objectives the other person has for the meeting in bulleted format on a notepad.
- Repeat the top 3-5 objectives the prospect/client states for the meeting in bulleted format to make sure you listened accurately to their meaning.
- Test the difference between offering a verbal summary and skipping it in a non-business setting; observe the impact on the other person (explain yourself after!).
- Listen to a partner during a prospect/client call and track how many verbal summaries the partner offers during the conversation; give feedback on the impact. Have your colleague reciprocate.
- Track how the verbal summary affects how your presentation is received by the other person.

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CFS Sales Huddles: Present

Key skills to reinforce in the Present area of the sales process are:

- Presenting from their world
- Presenting value first, attribute second
- Linking presentation to objectives

Suggested assignments

- Encourage the salesperson to review the value & attribute matrix to learn the content.
- Write your top three segues to gracefully enter the Present stage of the sales process (e.g., “you mentioned that...” or “one of the trends in the industry...”).
- Cover the attribute section of the Present matrix with your left hand. Describe the value of one item on the value side; at completion of the description reveal the attribute.
- Determine the top five objectives that are on your prospect/client calls; determine which value & attribute best answers those objectives.
- With a partner, role-play a prospect/client meeting; fit your presentation to the objectives your partner states.
- Write notes and practice saying your key messages within the specific time constraints of:
  - 30 seconds; one minute; five minutes; 15-20 minutes
- Practice each version of your presentation while being timed by a partner.
- For telephone experience, role-play the presentation sitting back-to-back to become more aware of the dynamics of the telephone vs. face-to-face.
- In small groups or triads, video tape simulated prospect/client calls (face-to-face for on-site meetings, sitting back-to-back for telephone meetings) and debrief using the feedback model of including process, content, and impact.
- Review a video tape of a best-practice presentation; model it and make it your own on future prospect/client meetings.
- Ask a friend who has little knowledge of your work to listen and critique your five-minute presentation. Ask them for candid feedback and invite them to tell you what they learned.

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CFS Sales Huddles: Confirm

Key skills to reinforce in the Confirm area of the sales process are:

- Asking for a decision
    - Direct question
    - Direct statement
    - Timeline/Time-driven
    - Process-drive/next steps
- Interpreting objections as requests
- Using the objection-handling process
- Answering objections effectively

Suggested assignments

- Write down exactly what you say at a prospect/client meeting when you are ready for a decision; compare this with the four methods of posing decisions in your manual.
- Review the list of most common objections that you hear. Review the interpretation of the request.
- Practice saying the answers to the most common objections to a partner.
- When objections are posed, take a breath and consciously slow down; effective objection-handling is about timing.
- Make it a rule that when an objection is posed you always ask at least ONE Investigative question.
- Note your best Investigative question for working through an objection and place it in your view (e.g., "help me understand your thoughts on that") on paper.
- Put yourself in the other person's shoes by giving an objection to a partner; feel the difference when your partner answers right away vs. when he/she uses the objection- handling process.
- Practice delivering the objection-handling process when a partner poses an objection to you; use your finger as a guide to follow the steps in order: Listen – Empathize – Ask Questions – Summarize – Answer – Check.
- Study the answer column on the objection/request matrix.
- Convince yourself first of the merit of your answers; ask colleagues and your manager if you have any hesitation that you are the best option for the prospect/clients.

CFS Sales Huddles: Position

Key skills to reinforce in the Position area of the sales process are:

- Building long-term client relationships
- Gaining cross-selling opportunities
- Gaining referrals

Suggested assignments

- Manage expectations and state next steps at the completion of every prospect/client call.
- Set up permission to proceed to the next step before ending the meeting or phone call (i.e., follow-up time and purpose).
- Write your opening sentence to cross sell. Then explain about the program.
- Set a goal for yourself that you will ask for a cross-sell opportunity on every client conversation in the next two weeks; compare these results to your usual results.
- Measure the value of asking for cross-sell opportunities from the client's point of view; determine how you've helped them. Consider what would have happened if you had not initiated the conversation.
- Write one sentence you use to ask for referrals.
- Set a goal for yourself that you will ask for a referral on every client call for one two weeks; compare these results to your usual results.
- Measure the value of asking for referrals from the client's point of view; explore the value of meeting people who need what you have and may not have found you if the referral had not occurred.
- Set a schedule in your calendar for contacting your key referrals sources based on their potential volume of referrals; invest more frequent touches with the ones with the most potential.
- Track the number of referrals you receive from various contacts. Let the referral source know the outcome of their referral and periodically send them a personalized thank you note to express your appreciation for their role in helping people.

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