



## CFS Skills Summary

### OPEN

- **Adapt to social styles to build trust and credibility**
  - **Controller** – Be brief. Be brilliant. Be gone.
  - **Expresser** – Be likeable and engaging. Be their “easy button.”
  - **Cooperator** – Be genuine. Be patient. Truly connect.
  - **Analyzer** – Be prepared and on point. Bring data.
- **Prepare a verbal agenda (can even email in advance)**
  1. Ask questions about their situation.
  2. Share information.
  3. Decide together on next steps.
  4. Invite them to add to the agenda.

### INVESTIGATE

- **Prepare strategic questions to get into the customer’s world and uncover buying motivation.**
- In order to be strategic, you must:
  - Know what you are trying to accomplish in the meeting and have options for next steps
  - Prepare accordingly
  - Choose what you will ask in order to set your “hooks” for present.
- **Areas to explore** – current situation, buying/decision-making process, needs/goals, challenges & cost of those challenges, budget, competitive landscape,
- **Use a mix of question types.**
  - Start broad with investigative and probe more deeply with open & closed.
- **Investigative Questions:** Explain, Share, Tell, Explore, Describe, Give, Help me understand
- **Open Ended:** Who, What, When, Where, How
- **Close Ended:** Do, Does, Have, Is, Are, Which
- **Use verbal summary to set your “hooks” and transition to Present**

### PRESENT

- **Stay conversational and relevant by using link statements**
- **Customer-driven link statements**
  - Use the customer’s actual words and link to the value you can provide.
  - “You mentioned earlier...our product does ...” or “You explained your need to...our team provides ...”
- **Company-driven link statements**
  - Use these to interject relevant value that may not have come up during Investigate.
  - “In our experience...” or “The trend is...”



## CONFIRM

- Gaining agreement for next steps and handling objections
- **4 ways to ask**
  - **Direct questions** – Would you like to move ahead? Are you ready to proceed?
  - **Time driven question** – What is your timing for making your decision?
  - **Direct statement** – Once we get started, here's what we need to do...
  - **Next steps** – Typically what we do from here is... Tell me a little about your process.
- **Remember decision-making based on social styles**
  - **Controller** – Wants options (May flip to "know it all")
  - **Expresser** – Wants testimonials (May flip to complainer)
  - **Cooperator** – Wants guarantees (May become indecisive)
  - **Analyzer** – Wants proof (May become unresponsive)
- **Conditions & Objections**
  - **Conditions are real things beyond your control that derail the sale** – Budget cuts, new CEO, acquisition
  - **When you hear a condition** – Position yourself for when circumstances are more favorable. Your credibility will diminish if you keep trying to sell.
  - **Objections are signals that you have more work to do** – Your price is too high, I don't see the need, We use another company that we are happy with.
  - **When you get an objection, view it as a request and use the objection handling process to answer the request.**
    1. Listen
    2. Acknowledge ("Ok")
    3. Ask questions ("Tell me more")
    4. Summarize ("So, it sounds like ...")
    5. Answer the request (Then, I'd suggest we ...)
    6. Confirm the agreement ("Does that work for you?")

## POSITION

- **Use PDCA process to stay closely connected with your accounts.**
  - Plan. Do. Check. Act.
- **Account management**
  - **Account history** – key contacts, buying history, billing info
  - **Top opportunities** – annual and quarterly review of your accounts relative to sales goals in order pursue top opportunities with intention and strategy