



the

sales
PLAYBOOK

Strategize

Execute

Win

the

sales PLAYBOOK

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Dear Readers,

PSA Security Network is dedicated to empowering its owners and customers to become the most successful systems integrators in the markets they serve. In support of this mission, PSA established a free-standing Sales & Marketing Committee to share knowledge, develop resources, and establish industry best practices for navigating the competitive marketplace.

The Sales Playbook is just one outcome from this volunteer taskforce of highly accomplished sales and marketing professionals. Covering the various stages of the sales process, the Sales Playbook is intended to serve as a dynamic resource to support training programs for sales teams. This comprehensive guide contains articles, questionnaires, and real-world scenarios with an emphasis on how to strategize, execute, and win opportunities.

The Committee will continue to develop supplemental materials that will enhance and build upon the fundamentals outlined in the Sales Playbook. We invite all PSA companies to be part of this process and ensure the Sales Playbook becomes a collaborative, annual publication designed to benefit all industry sales representatives, novice or veteran.

We encourage you to employ this Sales Playbook as you engage your sales team in the training process, and let us know what topics you would like included in future editions.

Sincerely,



Kimberly Rescigno
PSA Sales & Mktg Committee Chairman
Security Specialists | Director of Sales & Marketing



Robert Hoertsch
PSA Sales & Mktg Committee Vice Chairman
Low Voltage Contractors, Inc. | President

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Questions? Contact
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Or visit buyPSA.com

All leads are qualified to determine the potential of a sales prospect. While fairly encompassing, the questionnaire below provides a basis for capturing the necessary data that you would use in qualifying a sales prospect in your particular business.

Research to be conducted on the client's business:

- Company size, structure, and players (backgrounds)
- Awards, news, fines, recent staff changes
- Client's vertical market identification
- Client's vertical market growth areas
- Client's vertical market technology trends
- Client's vertical market security trends
- Client's competition

Business Baseline: Is there a good reason for us to work together?

- What is your organization's current philosophy regarding the safety and security of staff and visitors?
- What is your organization's current philosophy regarding the safety and security of physical and intellectual assets?
- How often are security and safety reports reviewed by your executive administration?
- Does your organization have a Central Security Officer?
- Do your Facility Operations and IT staff collaborate on safety and security solutions for your organization? How often?
- What other organizational stakeholders do we need to involve in the safety and security discussion?
- How can we help you get the other stakeholders involved?
- Are there any budget constraints?

Can you supply or describe these organizational plans?

| ORGANIZATIONAL PLAN | YES | NO |
|--------------------------------------|--------------------------|--------------------------|
| IT Security Plan | <input type="checkbox"/> | <input type="checkbox"/> |
| Fire Safety Plan | <input type="checkbox"/> | <input type="checkbox"/> |
| Asset Management Plan | <input type="checkbox"/> | <input type="checkbox"/> |
| Internal Employee Threat Plan | <input type="checkbox"/> | <input type="checkbox"/> |
| External Visitor Threat Plan | <input type="checkbox"/> | <input type="checkbox"/> |
| Workplace Violence Plan | <input type="checkbox"/> | <input type="checkbox"/> |
| Crisis Media (Public Relations) Plan | <input type="checkbox"/> | <input type="checkbox"/> |
| Severe Weather Emergency Plan | <input type="checkbox"/> | <input type="checkbox"/> |
| Earthquake Emergency Plan | <input type="checkbox"/> | <input type="checkbox"/> |
| Hurricane Emergency Plan | <input type="checkbox"/> | <input type="checkbox"/> |
| Tsunami Emergency Plan | <input type="checkbox"/> | <input type="checkbox"/> |
| Tornado Emergency Plan | <input type="checkbox"/> | <input type="checkbox"/> |
| Wildfire Emergency Plan | <input type="checkbox"/> | <input type="checkbox"/> |
| Medical Emergency Plan | <input type="checkbox"/> | <input type="checkbox"/> |
| Radiation Emergency Plan | <input type="checkbox"/> | <input type="checkbox"/> |
| Solar Weather Emergency Plan | <input type="checkbox"/> | <input type="checkbox"/> |

What term best describes your organization's current security operating procedures and why?

- Nonexistent
- Intermittent
- Underutilized
- Well-implemented
- Well-coordinated

With what frequency is your security technology updated?

- When was the last time it was updated?
- What were the results?

How many safety violations or security infractions has your organization suffered in the past year?

- What occurred?
- How was it resolved?
- How do you currently document and react to security incidents?
- What characterizes an incident?

Is your organization's premises insured against the criminal acts of a third party against your staff or visitors?

- Is your organization aware of the nature and frequency of criminal activity in the area surrounding your facilities?
- How do you manage visitors?
- How do you manage staff time and attendance?
- How do you manage access to operational business areas?
- How do you secure the premises after hours?
- How do you manage asset and activity surveillance?

What federal or state regulations is your organization subject to? (i.e. Graham/Reilly, HIPPA, CFATS, OSHA, etc.)

- What kind of documentation will help you meet these regulations (i.e. access control audit capability)?
- Who is responsible for reviewing the audits?

Engineering Qualifications (possibilities):

- Building on your business baseline, what can be accomplished professionally with your given budget and timeline?
- What areas of safety and security implementation would you most like to see improved? Why?
- What type of personnel and environmental monitoring capabilities do you currently implement?
- What reports are you currently tasked with in response to safety and security problems?
- How do you generate, manage, and archive those reports?
- Are current construction and electrical plans for the facilities available? What format are they in?
- What IT related constraints may this project incur?
- What timeline constraints may this project incur?
- What budgeting constraints may this project incur?
- Who needs to be involved in prioritizing the project phasing if the current budget cannot support a full implementation?
- Who is most likely to manage the project from concept through design, implementation, administration, and maintenance?

A key to effective selling is to facilitate a client in deciding the security scope. Assessing the location, providing comparative sites, and effective budgeting are important to gaining trust with a client and provide the foundation to understand what you are selling.

A key to effective selling is to facilitate a client in deciding the security scope. Assessing the location, providing comparative sites, and effective budgeting are important to gaining trust with a client and provide the foundation to understand what you are selling. The four essential elements to understanding what you're selling include:

1. Scope
2. Company
3. Client
4. Client Needs

Understanding the Scope

- Do the potential clients know what they need or are they looking for guidance?
 - What is their critical need or the area of sensitivity?
 - Is the client aware of what they need or are they looking for expert advice?
- How does an Account Manager sort through the issues to find a solution?
 - Are other parties involved (door hardware, elevator contractor, fire alarm)?
 - Are you speaking to the right person? For instance, should the Chief Engineer be involved in initial discussions?
- Are there standards used in other offices/buildings for this client? If so, is there room for improvement?
 - Are there areas that require card in/card out or additional authentication (fingerprint, pin code)?
 - Are cameras required in the perimeter? Are there doors requiring readers?
 - Do all photo ID's require a picture or indication of the level of security of the cardholder?
- Who are the key players to target? What is the primary business?
 - Is the location a bank, base building, airport terminal, retail store, or school? What does this location lack compared to others in the same industry?
 - Identify the contact who handles security decisions. It may differ from one industry to another.
- Are they looking to deter entry? Is there security personnel that monitors systems? Are there any back of the house issues/concerns?
 - Are there security officers or a security management team?
 - Does the receptionist monitor cameras or allow entry into the space?
 - Where are the vulnerable points of entry?
- What are the budget constraints?
 - When are budgets due? Is there a re-forecasting date?
 - Are you looking one-to-three years in the future to make suggestions for improvement or making additions to the systems?
- How can you marry the existing infrastructure or systems to what you propose?
 - Does the existing camera system have enough storage for additional cameras?
 - Does the access control system and the video system interface? What are the benefits? Is there an ease of use?
 - Does the client monitor visitors? Is there an interface between access control and VMS?

SECURITY NARRATIVE #1

Jim is a Security Director at a building that was affected by Hurricane Sandy. He is working on replacing all head-end components located in the basement that were damaged in the flood. You, as the security expert, create alternate locations in the building for the head-end and recommend back-up systems to notify the appropriate personnel. This value-added idea helped Jim present a safe and viable solution to his superiors.

Understanding Your Company

- Do you know about our company?
 - If yes, how do you know? After this explanation, you need to highlight key points that the client missed and are important to know.
 - » Bring a "cheat sheet" with bullet points that highlight key items of your company.
 - » What references can you provide that are in the same vertical?
 - » What projects can you reference that are similar in scope to the project you are recommending?
 - If not, do a brief explanation about our company highlighting your best side. Examples: References, experience, key personnel, certifications awarded, etc.
 - » Name a few key players in your company that would be a part of the project team. What is their experience and how will the project benefit from it?
 - Explain in detail how your company can comply with any requests or needs from the customer.
 - » Who is the inside sales/tech personnel?
 - » Is there after-hours service?

SECURITY NARRATIVE #2

Betty, a Facilities Manager, is searching for an integrator since she is not happy with the quality of service from her current vendor. She notices one of your vans and has decided to contact you for possible service. Once on the phone, you quickly discern the nature of her business and mention several other similar businesses you service. You also briefly describe the depth of your company and follow up with an email elucidating the strength of your operations. By providing references and success stories Betty is more inclined to test drive your company.

Understanding the Customer

- Previous study of the customer is a must.
- If they are doing something great or special, mention it or congratulate them. This is evidence that you did the assignment of researching them.

SECURITY NARRATIVE #3

Joshua has graduated from a local college with a degree in security. He prides himself on his education and is confident in his ability to know what is needed in his office. Tread lightly. Instead of extolling your years of experience, allow Joshua to work with you to determine the security requirements. Know your customer and quickly discern if they want to be involved in the design. Ask the right probing questions and let Joshua think he is making the recommendations.

Understanding Customer Needs

- The best way to understand something is to apply it in a real scenario with examples. How does your company improve any existing process?
- Explain in detail and demonstrate to the customer that you really know what you are doing.
- Be emphatic on how your company can develop a key project by their side.



SECURITY NARRATIVE #4

Four years ago, you presented a new solution to Darla, an existing client that is responsible for life safety. Her portfolio includes seven buildings which act independently. The solution you demonstrate links the systems of all the buildings together. Darla quickly claims no interest, since it doesn't apply to their set-up. This year, however, her VP decides independent systems are a thing of the past and asks Darla to budget an interface. Unfortunately, Darla has forgotten about that demo she attended and is Googling to find a solution.

This is tricky. Technology changes rapidly and sadly this may be a missed opportunity. One possible suggestion is to remind your clients what your company has to offer. Many Account Managers visit their clients during the holidays which may be a relaxed setting to bring up some other services you offer. If there is an upcoming demo at another client, mention it to your existing client to gently remind them of the depth of your company.

The important point to note is to keep the communication flowing.

When asked to present your proposal to the client it is of utmost importance that you come fully prepared. There are numerous types of interviews and each one should be prepared for differently. Let's discuss three types of interviews.

The Question & Answer Interview



In this case, the client has prepared a set of questions for you to answer. Typically all prospective bidders will be given the same list of questions and a certain time period is allotted to each presenter. The audience is a group of people with different roles in the project. After the interview process is complete, the group will present their recommendations to the final decision maker based on how well the presenter has answered the questions and the manner in which the answers were delivered.

The Q&A interview is actually the easiest to prepare for as you have the list of questions that will be asked and you will have time to prepare your answers. To succeed in this type of interview use the following steps as a guide:

- Make sure you have the answers to the questions already formulated in your mind and are able to respond to the questions without referring to written notes or other documents.
- Do not go off on tangents. It is great to tell a story about a similar project or a similar experience, but by straying from the direct question, you could be wasting some of your allotted time. Remember, your competitor was either just in this room or is waiting in the lobby for their opportunity to present.
- Bring along people in your office that have direct responsibility for the project or have a better knowledge of particular questions. Do not bring anyone that will not or cannot contribute to the conversation.
- A team of people at the interview shows a sign of strength and a depth in your company. Your client will realize that they are dealing with a team and are not dependent upon just one person to do it all. However, if you bring someone that has no input or direct responsibility on the project you may be giving the impression that you are not big enough to do the project or are inexperienced in the interview process.
- Make sure you have the answers to all the questions. NEVER go to this interview without knowing exactly how you will respond. If an unexpected question is asked and you are unsure of the answer, make a notation and ensure the potential client you will find the answer and follow up.
- Watch the clock, as you were only given an hour, but do not end the meeting. Let your client dictate how long the meeting will go. If the client extends the meeting past the allotted time that is a good sign.
- Dress accordingly. A suit and tie or formal business attire is not always the best strategy. Know your audience. Sometime business casual or even blue jeans are the right attire while other times formal business wear is preferable. Make sure you know ahead of time if the interview arena is one that will require special clothing or footwear. For example, if you show up for an interview at an industrial site wearing open toed shoes, you may be in safety violation and not allowed in the building.

The award on this type of interview will usually be delayed for a week or more. The client's representatives at this meeting will have some influence on the final decision and the group will have to meet again as a whole to determine who will be chosen.

The Scope Review Interview



In this case, the client is requesting that you explain your proposal and go into detail as to how your company will perform the work. The audience will usually consist of the decision maker, the project manager, the safety director, and possibly the end-user.

This type of interview requires that you prepare an agenda. All items on the agenda should be discussed and material to support the items listed should be brought to the interview.

The agenda should include:

- A heading listing the project name, the work scope, and the date.
- A list of items to be discussed in the meeting, including but not limited to:
 - Introductions/proposed staffing. Who is the principal in charge, the estimators, the project managers, and the lead foreman?
 - Scope review. This will include any project or scope documents, drawings showing extent of work and your design, schedules, any special systems, labor availability, and overtime hours required to meet project schedule. Also include qualifications and other “out of scope” items.
 - Preconstruction planning, such as permits, (if required), coordination with other trades or owner’s staff, long lead items, submittal schedule, and any schedule challenges or barriers.
 - Quality assurance. What are the client’s standards and how will you follow those standards on this project?
 - Testing and documentation. What is expected at project completion (electronic records, hard copy)? Is training required and if so, how and when will that training be done?

Typically longer in length, these interviews provide leeway to present your design and proposal in the best possible light. If you are invited to this interview, you are definitely in the final round and it is up to you to capture this project. Bring your experts with you. Bring people who will actually be on this project so that a relationship can be established at this meeting even before you are awarded the project. The client usually has a good idea who the project will be awarded to after these interviews are done and will take that decision to the CFO to get funding approval.

The One-On-One Interview



This is the interview you want to get! The client has reviewed your proposal, checked your references, has already gotten funding for the project and has probably determined that you, or at the most, one other integrator will be doing this project. What the client wants now is to see if you and your company are a good fit.

Usually less formal, these interviews will take place either at the client’s facility, a restaurant, or in some cases at your office. Typically it is just you and the client. There will be no need to bring others from your office and the client you are meeting with is the decision maker.

To prepare:

- Make sure that you are fully versed on the project scope, the equipment you intend to use, and the manner in which the project will be delivered. Bring a copy of the proposal and scope of work documents for referral.
- If you do not know the client from previous projects, research the company and the client via the internet or social media.
- Dress accordingly.
- Allow the client to lead the conversation and pay close attention to what the client wants to talk about. The client may talk for a while about their latest vacation, kids, or the company before getting around to the project. Follow the clients lead!
- Never talk politics or religion. If the client steers the conversation in that direction, change the course of the conversation.
- Never bad mouth or demean your competition. Instead, respond with statements like, “XXX is a good company; I don’t run into them much so I really don’t know that much about their work.”

At the end of the interview, it is highly likely that you will be given the project the same day. The client is just trying to measure you or your company. If you are not awarded the project at the end of this interview, they have most likely decided to go with another company or explore other options.

Who is making the decision?



The day has finally come. You spent countless hours estimating and putting together your proposal for the “big” project. You delivered the proposal Thursday last week and this week you received a call from the client asking you to present. You will be given one hour to present and you should be prepared to leave 15 minutes for questions and comments.

You arrive at the client's facility and are ushered into the boardroom. Seated at the table are five people. You introduce yourself, shake hands, and are either seated at the head of the table or standing in front of a presentation board.

The issue that creates some of the biggest deterrents to the sale process is the inability to identify the decision maker. Is it a single person in the group? Is it a committee of two or more people? Is it all of the people present, each with a different responsibility on the project?

Some of the actions you can take to determine who that person or group is:

- Before you arrive at the client's premises, investigate the company and their philosophy on their website. This will usually give you a good idea of how the company is run and may even describe employees and their function(s).
- Start the presentation by introducing yourself and ask that each person introduce themselves to you with their name and their project responsibility. This allows you to determine which person or group has the biggest stake in the project.
- If the role of the audience is still unclear after introductions, you can gain further knowledge by judiciously handing out information in separate formats. Bring two separate handouts. One presentation package can include all related financial and operational aspects of the project including the proposal, pricing, design considerations, references from similar projects, your company profile, and members of the company that will be involved in the project. The second package can contain the technical aspects of the project including drawings, device data sheets, and installation concerns. By stating the fact that you have separate presentation folders, ask the group who should get which folder, allowing you to determine project responsibility.
- If all members of the group want both folders, pay attention to which folder they look at first. The decision maker will look at the financial/operations folder first 90% of the time.
- Pay attention to how each member of the group is responding to your presentation. The person checking their watch or looking up emails on their cell phone is not the decision maker.
- Play your audience. Do not lock-in on one person unless directly responding to a question or comment from that person.
- If possible, walk around in front of the group. Never walk behind them or out of their eyesight. Watching the people who watch you will help determine who is interested and is responsible to make the final decision.
- Ask a question, such as:
 - “Will this team be making the final decision on this project or will you be giving your recommendations to someone else in your company?”
 - “Do you have a timetable when the decision on this project will be made”? (the person who answers this question is the decision maker)
 - “I will be out of the office for the next few days. Who should I give my associate's contact information to so that you can call him/her if you need more information or have a question?”
 - “When we are awarded this project is there any special safety or operational policies or issues that my people will have to undergo training on?” This question will usually be answered by the safety officer or by the project manager on the project. Although that person will have input on the project and the contractor chosen, they are rarely the final decision maker.
 - “Who is the contact at the facility in case I have a question or if I have additional information that I feel is relevant on this project and may help you make your final decision?”

- Ask for business cards from each participant. This gives you valuable information as to what position each person plays in the company.
- Finally, make sure you answer each question directly to the person who asked. If you are unsure of the answer, do not make something up. Instead, ask that you be given the opportunity to respond later either with a phone call or email and inquire as to who should receive the information. Typically the decision maker will ask that it be sent to him/her.

Although these ideas are not foolproof, you will quickly learn whether you have read the situation correctly or not. After your presentation, you can note who you think will make the final decision. If you are awarded the project, the answer will be obvious. If you are not awarded the project, you should contact the client and ask what made them decide against using you. The answer will probably be "you will have to talk to XXX about that." XXX is the decision maker. Keep track of how many times you correctly identified the decision maker. After a while this will become second nature and should ensure that all of your presentations are directed to the correct person/group. By following a few simple steps, you should be able to present more forcefully and land more projects.

Lessons Learned in Hearing What Your Clients are Saying

For years our client (let's call him Joe) was one of the best customers you could ask for. We got all of his work and he always had a good word to say about our techs and sales people. His facility was quite large, so we got quite a bit of work from him.

Then the day came when Joe took another position for another company and moved into a building that was serviced by our competitor. We visited Joe and asked, "When can we take this over?" Unfortunately the answer was that the building owners had a long term contract with the current company. As such, there was very little or no chance that we would be servicing this account in the near future. We kept in contact with Joe, but as time goes by, sales people are always looking for the next big thing. Our conversations with Joe slowly dwindled to nothing.

Two years after our last contact with Joe, one of our enterprising young people took the initiative and went to see Joe. Joe's first words were, "What took you so long? I was ready to switch contractors eighteen months ago." Great, well here we are!

So we asked Joe what we could do for him. His response was in the form of a question, "Who is going to be my customer service rep?"

The sales person responded, "Well me of course."

"Oh no," said Joe, "I will call you when I need a new system or when I want to change things or build an addition. I am done with sales people. I need a rep that will tell me what I need, not just push the latest gadget or technology on me because it will pay a commission. I need someone with integrity, knowledge and the ability to actually listen to what the client is asking and respond in a way that makes sense. I have already had the consummate sales person. I need a customer service rep."

Joe's needs were clear and the message was one we tend to forget. Our clients depend on us to keep their buildings secure and their people safe. The client comes to know our company and the people that work for us quite well, but unfortunately sometimes we give up too early or take people for granted. Sometimes sales people even take advantage of a situation to "force" the sale without paying attention to the long term outcome. Joe inherited a company in his new building that did not understand customer service, and as soon as the contracts ran out, Joe was looking to replace them with a contractor he could trust. Luckily we were in the right spot at the right time and had a proven track record.

We now have the contract, and a valuable lesson was learned. The reasons clients who leave your company or hire a different contractor are not always because of poor service or dissatisfaction. It could be just a matter of different circumstances. By maintaining contact with the "lost" client by assigning a customer service rep to those clients, you could be making one of the best business decisions ever. Once you regain a client from a competitor, the bond created is almost certainly unbreakable.



The day has come. You presented your proposal in writing and were granted an interview. It is impossible to just show up and expect a contract, so what can you do to ensure that you are looked upon favorably and the client is persuaded to use you as their contractor/provider?

Here is a list of some does and don'ts for closing the deal:

- ✓ **DO:** Come prepared. Make sure that you have investigated the client's web site, financial reports, newsletters, and anything else so you have a good idea of who the client is and how they operate. By becoming familiar with your client and their mode of operation, you can steer the conversation into areas and aspects of business that could form a common bond. This attention to detail shows your client that they are important to you and that you consider them a premier client.
- ✗ **DON'T:** Fake it. Do not try to pretend that you are aware of the client's accomplishments and/or business methodology if that information has not been made available to you. A savvy client will be able to discern your sincerity soon after you start talking. Your lack of credibility will often turn your client off and could negate all the good work that you did in preparing the proposal.
- ✓ **DO:** Try to establish that common bond. Everyone likes to talk about themselves and their success. By listening to the client talk and showing genuine interest you are creating a rapport with that client and giving them a reason to buy into you and your company. Be an eager listener while staying calm and interested by asking appropriate questions
- ✗ **DON'T:** "One-up" the client. If the client talks about the 8' sailfish he caught in Bermuda refrain from telling him about your 8.5' sailfish hanging on your office wall. Instead, express congratulations and excitement over the client's accomplishment, and if appropriate relate that you too have an interest in sail fishing and open a discussion on techniques and best spots to find sailfish. By discussing a client's interest on a peer-to-peer knowledge base, you will become more memorable with that client.
- ✓ **DO:** Be believable. When selling your product line or services, the client is expecting professionalism and credibility. You are the expert. The client has asked you to present because you have a solution for the problem and you are more knowledgeable than your competition. If you cannot present your product or services without referring to written material, making a phone call, or putting off the question to be answered later, then you need to bring the person in your office that can provide this information. There should be no question that you cannot answer. By being the expert, you narrow the field of competition and give the client the sense that they are contracting with the best.
- ✗ **DON'T:** Bluff your way through a presentation. The inability to answer questions about your product is a death knell. If the answers and information you present are later found to be untrue or incomplete, the client will have serious doubts about your ability to supply and install the correct equipment or services needed. The impression you create will be one of a sales person trying to sell the latest gadget.
- ✓ **DO:** Be methodical. Present your solution in an orderly fashion. Show the resolution to the issue in a clearly defined work scope. Present the solution steps that are easy to understand with a definite start and finish. Make sure that the solution addresses all aspects of the proposal. Bringing a Gantt chart or a Microsoft Project schedule is a great way to walk the client through the steps necessary to complete the project.
- ✗ **DON'T:** Shotgun the approach. Presenting a project timeline that does not follow a definite pattern or a presentation that leaves the client confused as to the scope of work will destroy your chances of winning the project. Confusion at presentation equals confusion and added expense during project completion.



- ✓ **DO:** Under promise and over deliver. Delivering the product or services in a manner that is above expectations, you create an excitement with the client. The client looks good to the investors and takes credit for the successful project. You, as the integrator, have provided products and services above what was promised. By under promising you also leave yourself some wiggle room to deal with issues and problems that may arise on the project. Be realistic and conservative in ship dates, completion dates, and amount of time needed to bring the project in successfully. Keep this data as close to real time as possible but make sure that there is a margin of safety in what you tell the client.
- ✗ **DON'T:** Build an unrealistic picture of success. Bragging has no place on a project. By touting your services and product line as invincible and assuring your client that nothing can possibly go wrong, you are setting yourself up for disaster. The first time even a minor hiccup happens, the client will immediately look upon you and the project as in jeopardy. There are a vast number of things out of your control that can affect the project either positively or negatively. Make sure that you have a contingency plan.
- ✓ **DO:** Close the sale. Pay attention to the buying signs and make your move. Make sure that you have with you all the necessary paperwork required to complete the sale. If you are unsure of the client's readiness to sign a contract, ask for it.
- ✗ **DON'T:** End the presentation by promising to get back to your client at a later date. By ending a professional presentation without a contract in hand or a written or oral promise that you will be getting that contract, you have allowed your client to second guess his decision. If you have not sold your client during the presentation your odds of success diminish by at least 25%.

Although there are many more tips and techniques to closing the deal, these few suggestions will increase your success rate.



In today's constantly changing sales environment it is important for sales people to keep as many weapons in their tool belt as possible. Buying cycles have become more complex and so have the solutions customers demand. As a result, business-to-business sales now often involve multiple sales representatives from a single organization and sometimes from multiple vendors. Having sales representatives that are willing to partner, coupled with a management team that fosters partnering, will benefit both the sales team and the organization.

Types of Partnerships for Outside Sales Reps:

- Inside Reps
- Other outside reps with more experience
- Other outside reps that specialize in certain disciplines
- Engineers
- Other company's reps
- Vendors/manufacturers
- Contractors
- Vertical market specialists
- National account sales representatives

Things to consider in partnerships:

- Be the kind of partner that you would want to partner with.
- Integrity is important in any partnership.
- Look at the partnership from the other person's side.

Things to consider when talking to the customer:

- Integrity. Clearly explain the sales relationship, roles, and responsibilities to the customer.
- Make sure you include the customer upfront in the decision to partner.
- One person should be the lead.

Sales Management Challenge

- Sales managers must establish an environment in which the partnering can take place without creating conflict. This means creating compensation programs that reward each rep for work done.
- When partnering with outside organizations, contractual issues may need to be worked out. Issues like scope, payments, and logistics all need to be resolved.
- The CRM must have the capability to have multiple reps involved in a customer.



Sales Rep Challenge

- Most reps want to maintain control. You must be willing to give up some control for partnerships to work effectively.
- Don't keep info to yourself, share.
- Trust is the most important part of any partnership. Be willing to trust. Continue to work on the relationship with your partner as hard as you would on the relationship with the customer.
- Continue to educate yourself in the field. Technology is constantly changing and you should keep up with the industry.

Forge Effective Sales Partnerships

Once you've created a culture that encourages partnership and the establishment of mechanisms that make partnership into a business reality, the following process can help you ensure successful sales partnerships:

- Perform a self-assessment. Understand what you bring to the partnership. Use the SWOT (Strengths, Weaknesses, Opportunities, Threats) method to determine what you and your organization have to offer and what you might need from the outside.
- Perform due diligence. Understand your partners. Make sure you know how willing they are to partner.
- Build a relationship consensus. Have a meeting with your partner. Talk through who is going to do what in the partnership.
- Execute your commitments. Do what you say. Always over deliver your commitments. It takes time to develop trust.
- Measure. Use a strong CRM system to log activities and report your results.
- Reinforce and celebrate. Invest time to reinforce the relationship. When you do close a deal, make sure you celebrate and include everyone involved.

Top Partnering Benefits

- More feet on the street
- Targeting of multiple channels and customers
- More knowledge and expertise for customers
- Farming of the other representative's contact lists
- Selling complementary products
- Higher lead conversion rates
- Reduced sales cycle times
- Lower churn rate
- Greater sales productivity from new hires (quicker ramp up periods)
- Flexibility
- Lower customer acquisition costs
- Increased profitability
- Expanded sales footprint (without additional costs)
- Competitive advantage



