



Can you answer these questions?

Below are questions that Alexander Consulting is frequently asked by clients when they wish to conduct a professional services sales audit process and are frustrated with their services sales performance results:

1. Can our sales force realistically sell more professional services with our current process in selected geographic markets?
2. If yes, how big is the professional services sales gap? How long will it take to develop the necessary capabilities? What specific skills need to be acquired or developed to close gaps?
3. What interventions are necessary to sell professional services?
4. What is a realistic time frame to expect an increase in professional services sales capabilities?
5. What are the selling strengths that can be leveraged and built upon to reach other geographies in a professional services sales role?
6. What are the selling barriers to making this transition? How can they be eliminated or at least minimized across entire target markets?
7. What are customers' perceptions related to our companies' current professional services offerings?
8. What measurement system and sales metrics can be established and utilized to effectively track professional services sales and individual performance?
9. How aligned is the current portfolio of professional services to current and future needs?
10. What value-based propositions need to be developed to meet customers' expectations?
11. What new or enhanced services need to be developed to motivate customers to buy?



Step 1: Evaluate how you stack up against professional services sales benchmarks.

Taking a step back to review all of your existing information, specific to your business development efforts, enables you to see trends and identify historically where you have stopped growing and how existing efforts stack up against best practices professional services sales data available through organizations like the Technology Professional Services Association and professional service experts and consultants.

*1Source: *The State of Professional Services II* by James A. Alexander, Alexander Consulting, LLP.

Step 2: Interview key stakeholders.

Collecting information from those who “touch the customer” is a critical next step in the assessment process. Through an onsite interview process with management and key people, critical sales issues surface and barriers are identified. This process also helps to focus the assessment and ensures that those who will be most effected have had an opportunity to share their ideas confidentially and constructively.

Step 3. Ride with the sales force on customer calls.

Riding with your sales force on customer calls can be quite a revealing process, as you witness firsthand exactly how your sellers handle creating trust; identify services and solutions customers need, want and expect; pick up verbal and non-verbal clues; as well as position services in a manner that focuses on value, results and long-term benefits. This type of observational field process is best managed when you select several high-performing and average-performing sellers of services to ride with the on-call staff.

Of course, the goal is to provide real-time information as to how to improve the selling process and to target where sellers could most improve, but we know that your high performers are quite frequently doing great things in the field that never get noticed, nor identified. On the other hand, your average sellers may not be doing several things (asking open-ended questions, sharing services best practices and lessons learned, identifying the critical business issues of the prospect, etc.). Once these issues have been identified, helping the seller gain the skills to utilize these techniques is not that difficult.

Step 4: Conduct focus groups with your services sellers.

3. The skills, abilities and processes of those responsible for selling services are assessed to determine who has the mind-set, knowledge and ability to effectively sell services.
4. Firsthand observations while sellers are calling on customers paint a realistic picture of field realities, because findings are based on what people actually do, not what they say they do.
5. Involving those most affected by the sales process builds support for changes that will evolve as a result of the audit.
6. Real-time sales experiences are made visible in order to restructure and re-vitalize what is needed to improve your services sales efforts. These experiences are built into training events that sellers can practice so they improve in areas where gaps in selling exist.
7. Conducting the services sales audit before training provides valuable data to focus on the primary areas sellers need the most improvement to sell services effectively.

Training your sales force to sell services and solutions is an important step in the right direction, when skills and abilities need to be increased and you wish to shift mind-sets, build skills and increase confidence to sell services. When you conduct a services sales audit before training and integrate the findings into the training experience, you realize the best of both worlds ... a more effective services sales process ... and increased capabilities of the sellers to sell services — a winning combination!

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