Best Day, Every Day: Rules of the Road for "Getting to Yes" in Professional Services Selling

BY MARK HORDES

Think about how much things have changed in professional services over the past several years. It wasn't too long ago that product companies were content to sell their "boxes," install their networks, create their portals, and differentiate themselves as the company that owned the CRM and B2B space. Despite the predictable, competitive challenges that have forced e-companies and others to look deeper into what they really do well, one thing has remained the same: the necessity to motivate a potential customer, client, buyer, or alliance partner to say "yes" in a professional services sales situation. "Getting to yes" has not always been easy, even for the strong-of-heart and most dedicated services professional. Building a "best day, every day" services sales reality can be accomplished if you focus on the right things, prepare well, understand the sales life cycle, and are open to the concept that selling techniques for products and services are quite different.

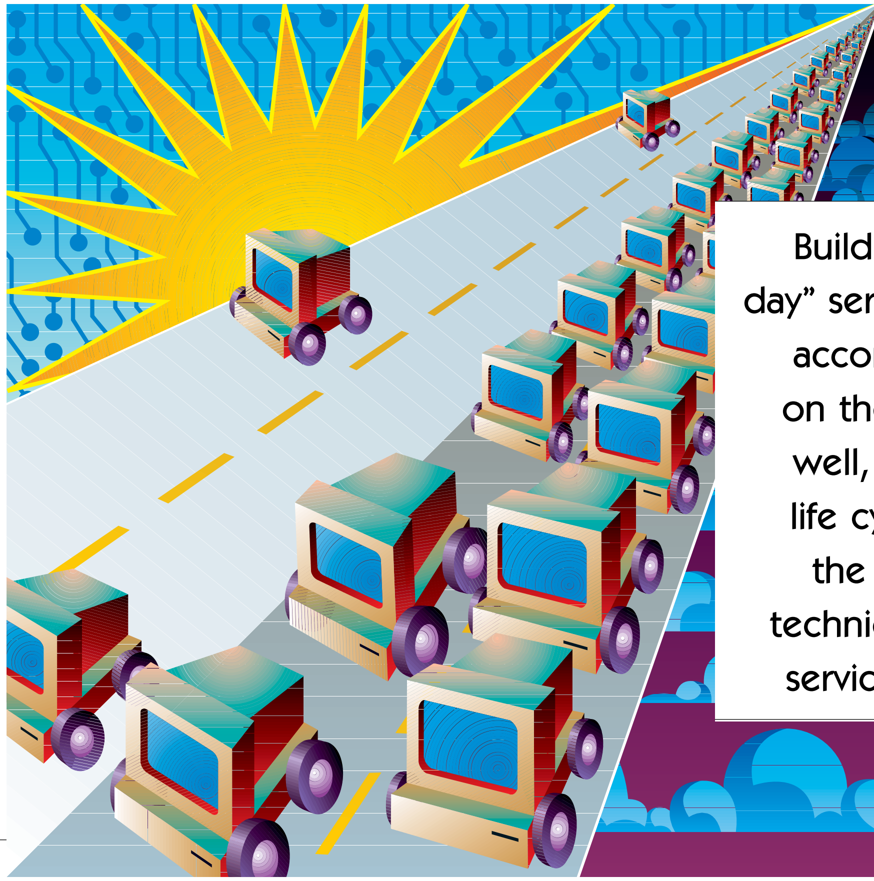
In the Beginning

Someone once said, "Life is a selling situation." I'm not sure who had this observation, but over the years, I have come to appreciate the concept. For example, every day we share ideas with colleagues and often try to sell our point of view. When seeking a position with a firm, we aim to position our experience in the best light and sell our skills to a potential employer. With our spouses and significant others, we engage in either peaceful or conflicting situations, depending on how well we have communicated our preferences, habits, and lifestyle issues. With customers, clients, and prospects, we strive to motivate, meet a need, and posture our service benefits to solve problems, present opportunities, and meet challenges to make the road ahead a bit easier and ideally more profitable so a win-win outcome may emerge.

Rules of the Road

In today's professional services marketplace, what has been the greatest transition? Transforming the product salesperson into a highly competent and successful consultant and professional services sales executive. Today's sales professionals must understand how to sell away from "break-fix" and create an enterprise "total-solution" answer that addresses a client's problem and positions your services to support your products and consulting offerings in the best possible light.

Professional services selling can be quite complicated, as intangibles have to be positioned on a pyramid of trust, market reputation, and mixture of good, old-fashioned chemistry between the person selling and



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the person buying. In most selling situations, as in life, first impressions matter. And as my mother used to say, "You get only one chance to make a good first impression." So how do you make a good impression? How do you structure the selling situation? How can you take control of the selling environment and, in a short period of time, quickly bond with a client, understand the challenges your client faces, and communicate your service offerings and potential solutions? Let's explore the Rules of the Road on how to make your professional services selling a "best day, every day" experience.

Rule #1: Create an Internal and External Reality

It might seem outdated in an age of "business casual" dress and "let's do lunch" mentality that an individual who sells professional services should embody a highly polished professional image. Remember, you are the company and all that it represents from the moment you introduce yourself to the moment you say goodbye. What's important to learn in this situation?

First and foremost, before a services sales call, I research the company. Using the Internet, I explore their service offering, research the industry they are focused on, and try to obtain an understanding of the look and feel of the culture I am entering into on a first call. Are they a new e-commerce venture company where urgency is valued, or are they a client organization waiting for things to happen rather than making a new reality? Emotionally, while waiting to see a client, I try to focus my attention on the environment around me. What's on the walls? What does the space tell me about their culture? Does it foster open communication or generate a feeling of high structure that says, "We are all business experience?"

In viewing my external reality, I also explore my internal reality. Like an athlete before a major competitive event, I try to get in touch with what I'm feeling internally. We all know that, quite frequently, what we feel on the inside quickly gets reflected on the outside if we are not conscious of what's going on. My time and the time of the person I'm meeting with are too valuable to be wasted without my first being clear on my own emotional assessment.

Can I envision what is going to happen on the call? Can I stay quiet and listen more than I talk? Can I look at the client and really pay attention to what he is saying? Can I understand what he is feeling and thinking? Am I aware of the nonverbal messages that are being communicated? Can I quickly find some common ground to break the ice, like a picture of his family or a question about how long he lived in this area? Am I projecting an enthusiastic expression on my part that I really do appreciate the time we are sharing together and that I care a great deal about learning who he is as a person as well as his professional services challenges? Remember, you only have a brief moment to make a positive first impression, so make it as impactive as you can by keeping your internal and external compass in balance.

Rule #2: A Picture is Worth a Thousand Words

If I have learned one thing in selling and delivering professional services over the past 25 years, it's "Draw me a picture." What does it mean? It is essential in selling services that you are able to make the intangible tangible. This is not an easy task.

One way to go about it is to literally draw a picture for the client. This can be accomplished on a white board, flip chart, or the back of a piece of paper. For example, when visiting a client, I will go to the white board and begin to illustrate how our firm got started, evolved our service lines, and developed our service offerings to meet marketplace needs. Before you know it, the client is also up at the board with me, sharing their story and interacting as though we are partners and colleagues solving problems together. I also try to share some best practices by drawing a matrix or benchmark continuum and asking the client to pinpoint where he sees himself today and in the future. This process leads to an enriching experience for all who are in the room. Even in situations where I am selling to a team of executives, some basic, small-group dynamics play a critical role in involving them in the story. Create the story, involve them in the story, and you will succeed in making the intangible into a tangible reality.

Rule #3: Selling Services Requires Breaking the "Old Rules"

Think for a minute about what comes to mind when you envision traditional selling. Probably the classical product salesman loaded with samples, spec sheets, discounts for volume purchases, and a fundamental belief that buyers lie. In a services environment, it is quite different. In fact, services selling is very much a relationship experience from the moment you meet a prospective client through the entire life cycle of the sale. Let me share with you a few examples. In relationship services selling:

1 **The selling is helping**. Help define the problem the client is facing and its impact on the internal and external environment, the service lines, market positioning, and its consequences to its consulting organization. The secret is to build a sufficient level of comfort quickly so the buyer begins to experience your interaction with him as part of their team. How can you accomplish communications quickly? The answer lies in doing your homework before the sales call so that you are familiar with the professional services industry and where the client is positioned within that framework. Are they moving from a direct-delivery consulting force to a new Internet indirect play? Have their license fees decreased over the last six months? Are they more of an alliance-delivery organization, or are they organized by service line in their deployment efforts? Knowing this information, plus a few good case examples of where similar client problems have been successfully solved, quickly helps create an "I'm-here-to-help" experience.

2 **Follow-up is essential**. It is rare that you meet a client, define a problem, and close a sale. In services selling, numerous factors need to be addressed before a deal is closed. For example:

- You must present your proposal in no later than five days, although three is better. After five days, too many things will have impacted your proposal to have the scope stay the same.
- You must understand who within the organization the deciders, approvers, influencers, and advisors are. Each person in that sphere requires a different approach. Some require additional examples, others are concerned about costs, and still others just want to feel comfortable knowing that they have been involved. Taking the time to understand who is in each role and how best to approach them is well worth the investment. On the initial visit, I frequently ask, "How are decisions made?", "Who else typically gets involved in working with outside firms?", "Can you describe the last external project your company was involved in and tell me why it worked well?", and last, "What kind of budget do you have to work with to solve this problem?".
- You must present a proposal that represents your best work. What I mean by this is that you have to be extremely sensitive to the messages your proposal presents to multiple readers. Does the

Figure 1

Our Values	Importance to You
• We believe in partnering.	• Partners mutually commit to deliver value.
• We utilize only the best data.	• Our advice is always based on market reality.
• We believe in honest communications.	• Communication builds trust and respect.
• Our expertise is based on experience.	• Our advice will sustain the test of time.
• We believe in measuring results.	• Creating an impact delivers results quickly.

proposal adequately identify the problem, state a hypothesis, define the scope, and illustrate the steps and process you will go through and the deliverables you will provide if afforded the opportunity to work with their organization? As a general rule, any graphic illustrations and models that you present should be simple to understand and have a topic sentence that sums up the entire picture. Other components such as your experience, qualifications, investments required, schedule, and the process you will put into place to manage risk is also important. And last, one little touch that I utilize that makes a difference to clients is to end with a short list of how the values of our firm are important to the buyer. *Figure 1* shows a brief example.

Rule # 4. Building Services Selling Skills Requires Skills Building

Let's get right to the point: How do you teach professionals to sell professional services, and what are the critical topics and processes that need to be addressed to make a program successful? Ten years of training service professionals has taught me that the following topics not only make an impact, but they also provide the skills that aid in building a successful professional services sales force:

Module One: Teach Everyone the Realities of the Services Landscape.

- Professional Services Market Entry Issues.
- How to Create Demand and Leverage the Service Business Life Cycle.
- How to Sell Intangibles versus Products.
- How to be Successful against Internal Competition.
- How to Sell Value and Build Commitment and Shared Trust.
- How to Communicate Issues Impacting Service Line Integration and Delivery.

Module Two: Practice Managing and Leading the Services Sales Cycle.

- How to Manage a Continuous Services Sales Relationship.
- How to Discuss Risk Management and Avoidance Issues.
- How to Sell Time, Rates, and Value.
- How to Propose Services.
- How to Overcome Service Objections.
- How to Position Services Expertise and People Performance.
- How to Leverage Market Intelligence.
- How to Close at Multiple Levels of Relationships.
- How to Utilize a Services "Power Map."
- How to Communicate Service Uniqueness.
- How to Tap into Emotional Buyer Values.
- How to Communicate Pricing and Quality Issues.
- How to Utilize Your Own Interpersonal Style to Bond Quickly with the Client.

Module Three: Reinforcing and Delivering the Sales Services Promise.

- How to Propose the Total Enterprise Solution.
- How to Discuss Discount and Risk Sharing.
- How to Develop a Powerful Account and Master Plan.
- How to Scope the Work.
- How to Avoid Scope Creep.
- How to Deliver and Integrate the Work.
- How to Shorten the Delivery Cycle.
- How to Manage the Post-Close Relationship.
- How to Leverage New Business.
- How to Build an Effective Client Account Plan.

Prologue

So here you have it! Four simple rules of the road to keep you focused and successful in selling professional services. Make every day a best day by knowing the best path to follow, and your services journey will sustain the test of time. ▼

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