

# intelliVen

Intelligent Strategies. Successful Ventures.

# *5-Steps to a Sale*

Educate prospects on how the best do what they are trying to do and how you can help.

# ***Step-1: Describe to your prospect what you think s/he is trying to accomplish.***

## *Note:*

- Select the prospect because s/he would make an ideal next customer in that what s/he most needs next is what you happen to have.
- Focus on business results sought.

***Step-1: Describe to your prospect what you think s/he is trying to accomplish.***

***Step-2: Describe what others who have done the same found difficult.***

*Note:*

- Reference organizations who the prospect admires.
- Keep the spotlight on others.
- Provide details that will surely match prospect's case.
- Provide one or two key points that the prospect has yet to think of.
- Think "*teaching*" vs. "*selling*".

***Step-1: Describe to your prospect what you think s/he is trying to accomplish.***

***Step-2: Describe what others who have done the same found difficult.***

***Step-3: Describe how the best have succeeded.***

*Note:*

- Mention at least a few challenges and solutions that the prospect is unlikely to have already thought of.
- The approach positions you as *expert/teacher*; one to look up to for insight, knowledge, answers.
- Do NOT yet mention your organization or even who did what...focus just on what was done to be successful.

***Step-1: Describe to your prospect what you think s/he is trying to accomplish.***

***Step-2: Describe what others who have done the same found difficult.***

***Step-3: Describe how the best have succeeded.***

***Step-4: Lay out alternative paths forward.***

*Generally three options:*

- Continue as is.*
- Use insights from today on your own.*
- Get help from an expert.*

***Step-1: Describe to your prospect what you think s/he is trying to accomplish.***

***Step-2: Describe what others who have done the same found difficult.***

***Step-3: Describe how the best have succeeded.***

***Step-4: Describe alternative courses of action.***

***Step-5: Recommend next steps .... and add how you can help.***

***Step-1:*** Describe to your prospect what you think s/he is trying to accomplish.

***Step-2:*** Describe what others who have done the same found difficult.

***Step-3:*** Describe what the best have done to succeed.

***Step-4:*** Describe alternative courses of action.

***Step-5:*** Recommend next steps.



**Who is trying to do what:**

**Who:**

**What:**

**5-Steps to sell \_\_\_\_\_  
what we have done so  
successfully for \_\_\_\_\_.**

**Options going forward:**

1. As is.
2. On your own.
3. With help.

**What peer did that was particularly clever to be successful:**

1.

2.

3.

**What someone at a peer organization found hard about doing something similar:**

1.

2.

**What we recommend and how we might be able to help.**

1.

2.

3.

# Solutions Example

- A communications firm currently provides services for a major oil company to help employees understand and support offerings to customers.
- CEO learned that a major bank wants to develop internal advocates to reach out and connect to their community.
- Networked to head of Consumer Public Relations who wants to prove that internal brand advocacy leads to connections that create action and prove that there is a return on marketing investments.
- Ready to pitch.

# What ComFirm provides, for WHO, and WHY.

ComFirm provides...

**WHAT**

Internal communications management of brand advocacy programs

for...

**WHO**

Top unit leaders of the largest organizations in regulated industries.

**WHY**

they pay for it.

To crystalize and communicate corporate messages to targeted internal and external stakeholders to drive targeted behavior.

**Who is trying to do what:**

**Who:** Head of consumer communications for a regional offering.

**What:** Get her team to deliver feel-good messages to prospective customers

**What someone at a peer organization found hard about doing something similar:**

Employees didn't ever think to talk about company offerings (e.g., at dinner parties).

Technology used in each part of the org is quite different.

## **5-Steps to sell Major Bank what we have done so successfully for Major Oil Co.**

**What peer did that was particularly clever to be successful:**

Internal questionnaire geared to topics that would: create excitement at a dinner party, bring good thoughts about company offerings to mind.

Contest to get people engaged and thinking about offerings to become brand champions.

Response and engagement rates off the charts.

**Major Bank's options going forward:**

Keep doing as is (but that is already not working!)

Do on their own (but would that really happen?)

Do it with outside help (as the best have done).

**What we recommend and how we might be able to help.**

Put someone in charge.

Identify brand advocates

Create a brand program.  
Set goals and metrics.  
Retain outside help from a firm that has done this well for similar sized firms (such as ours).

# Discussion

- What potential hurdles with the prospect does the 5-Steps to a Sale help overcome?
- What preparation does one need to do to make the 5 Steps to a Sale work?
- What would be hard about training your top players to follow the 5-Steps to a Sale?
- How does 5-Steps to a Sale compare with what you have done previously?

# Read selected answers to the questions below:

- What have you already done to sell again to your most important prospect what you have done previously for your best current customer?
- How well is what you have done working?
- What is your favorite question to ask an important prospective customer when you visit or talk with them in person?

# Thank you.

Subscribe at [www.intelliven.com](http://www.intelliven.com)

Follow @intelliven