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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.

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