

# Who to Who Sales Toolkit

## *Gather Intelligence*



[www.HowToWho.com](http://www.HowToWho.com)



## Gather Intelligence

Congratulations on the great effort in identifying and selecting the relationships on which you want to focus. It is no easy task to complete the Relationship Wheels and Relationship Matrices.

The next step is to make sure you know as much as you can about the relationships you've prioritized. From a business development perspective, intelligence gathering is a powerful gateway to opportunity. Build a file of information and knowledge. Somewhere in there is the key to doing business together.

Another advantage to understanding someone is the opportunity to be generous. Finding opportunities to be generous is a power all unto itself. Generosity that is genuinely connected to need or desire is especially strong. It creates emotional connections and lasting memories.

Generosity though is not a game where you keep score. Be generous for the sake of the act itself; not for what it may potentially get you in return.

### Existing Relationships

The frequently untapped goldmine for many businesses is current customers and relationships. Getting a customer on board is hard work. Forming a strong relationship with a well-connected person takes time. Once you have these relationships, don't take them for granted; continue to nurture and build them.



Also, look to your current customers for insight as to the value you deliver. Explore and quantify the benefits they receive from working with you. Ask them what they like. Ask them what they would like to see improved.

Beyond value delivered consider the strength of your relationship. Assess the trust level for each relationship. If trust is low, explore opportunities to strengthen the relationship. Being generous is always a good starting point. Continue to seek out ways to help, regardless if the source is you or another.

Assess how you work with a customer. What is your current mode of selling with this customer? Are you collaborating, providing solutions, or are you in more of a sell/tell mode? Employ your communication skills to learn more and understand more; find more ways to get to know your customer.

Figure out what's already working. These questions will help you gain insight into how you are in relationships with your customers. Consider one customer relationship at a time:

1. How would you characterize this top relationship? What makes it special?
2. What are 3 key things you'd like to understand about that person (beyond demographics)?
3. What, in your view, makes this relationship really work?
4. Can you recall a moment/incident that caused this relationship to come together?

5. What does this person offer you that makes the relationship important to you (other than sales revenue)?
6. What do you offer in this relationship that makes it work for the other person? (If at all possible, ask the other person this question.)

Write down your answers and take the time reflect on them. Herein lie keys for you to gain insight into what you offer and what about you makes you valuable in your relationships.

## Desired Relationships

Historically market research of desired relationships entailed only getting information on the company, their overall challenges, and how your products and services might provide solutions.

***The more you know the stronger your chances for connecting and building a relationship.***

This traditional approach is a good starting point. For relationship-based business development, the research needs to go further. The research needs to be as much about the people as it is about the company. Expand beyond industry reports, company financials, annual reports, company website reviews, and Google searches on the company.

Look for insights about the people, their values, and what is meaningful to them. Any insight helps. Some information sources include:

- LinkedIn profiles
- LinkedIn connections
- Facebook page
- Facebook friends

- Tweets they make
- Associations, organization, and board affiliations
- Education background
- Feedback from other sales personnel
- Google searches on the person

There are a lot of competitors looking to match solutions to needs. Salespeople who believe they can add value approach customers frequently. In almost all of these cases their value is tied to a product, a thing to fit into a puzzle.

The astute relationship builder realizes that a product solution is only one piece of the puzzle. Relationship builders look beyond individual pieces; they look at the cover of the puzzle box. What does the overall picture look like?

This level of account intelligence focuses our thinking on relationships. And in most cases, in-depth research on prospects enables an opportunity for a warm connection and introduction.

## **Connectors and Influencers**

In researching connectors and influencers you'll follow a path similar to the research you did with desired relationships. Understand not only what they do, but also use the same tools to learn about the person.

## **Internal People**

Who are the people who help make you successful? Think about who impacts your success — who interacts with your customers, who's involved in scheduling, in billing, in operations, etc.? How do your other team

members, even contractors and suppliers, impact your ability to do your job effectively?. These people are important to your success; your relationship with them is important.

How do you demonstrate to these people that you value them? Do they know you value them? Which relationships do you need to improve? Strengthen the relationship with them.