Who to Who Sales Toolkit

Build Activity Plans

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Implementing a Lens of Relationship approach to your sales probably represents a big shift for you — sure, a shift in your activities. But when you think about it, you also need to shift how you think about your work, how you interact with everyone, and how you focus your time and energy. This can be a big change.

You've put in a lot of work to identify the relationships that are important. You've prioritized the relationships in terms of their value. You know which customers to focus on, which desired customers you want to connect with, and which introduction sources you want to meet. Now it's time to turn analysis into activities and results.

Your challenge is figuring out the best way for you, in your personal style, to get to those results. Certainly, starting this program with each and every one of the relationships you've identified all at once can be overwhelming.

Each of us works with different levels of energy, zeal and commitment. As you know, changing behaviors takes a lot of commitment. So what type of person are you? Are you comfortable making a wholesale change in how you do things, or are you comfortable trying something to see how it works before you change your ways? Neither style is good or bad; it's just personal.

If you're the type of person who likes to jump right in, we recommend that you fill your calendar with activities that reflect your personal commitment to making this change in your approach to sales. For you, we recommend a minimum of 9 activities per week. Fill your time with, for example, 3-4 Relationship Building activities, 3-4 Sales activities, and 1-2 Marketing activities. The idea is to immerse yourself to help yourself stay in the Lens of Relationships, and not fall back into the traditional transactional style of sales.

For those of you who prefer dipping your toe in the water first before jumping in, keep it simple. Pick 3 activities you will focus on next week — maybe it's 3 relationships you need to strengthen — maybe there are some Relationship Building activities you want to take care of, or maybe there's an urgency to one of your relationships. What matters is that every week, you do 3 activities that help you shift into the Lens of Relationships. In this way, as you experience success with the Lens approach, you will naturally start to do more. The caution here is to remain aware of when you're working in the Lens world or the transactional world.

Regardless of your personal style, your focus is to have your activities strengthen relationships, move sales opportunities forward, or enhance your marketing.

For example, in one week you might:

- Develop an existing customer relationship further.
- Meet a desired prospect.
- Begin a relationship with an introduction source you want know.
- Meet an influencer on your desired list.

The zealots among you may do all this in 1-2 days. It doesn't matter how long; what matters is that you do it.

The point is to begin. Producing results requires activity. *So, while success is not dependent on numbers, it is dependent on activities.* You have to go out and perform strategic activities in order to make something happen.

Activity Plans - Make Stuff Happen

Activity plans are where concept and desire translate into reality. In broad terms, think about activities falling into either the Relationship Building category, the Sales category, or the Marketing category.

Relationship Building Activities

Focusing on relationships does not mean less work.

It does mean smarter work.

Relationship building activities are exactly what it sounds like - doing things in order to strengthen existing relationships or initiate desired relationships. If there are existing customers where a stronger relationship is needed, do something to strengthen it. If there are desired customers or connectors you want to meet, find the warm introduction source and connect with them.

Relationship activities are focused on individuals, tailored to the person. The #1 pursuit is to meet people face-to-face; nothing replaces meeting person to person. For other types of outreach beyond in-person meetings, you can use phone calls, electronic touches, notes, letters, remembrances, gifts, events, and social media.

Generosity is a great relationship building activity. It means you are thinking about the person and what they need. Look for things you can offer your customers that add value for them. Schedule Generosity into your calendar, say once per week focusing your thinking on others, bringing them to front of mind. Examples of Generosity activities include:

- Forward articles of interest -- Set up Google alerts so you are notified when articles appear on topics of interest to individuals or segments of your customer and prospect base. Forward the article and personalize the email or note.
- Books – Use your account with Amazon or Barnes & Noble; when a book of interest to a customer or prospect comes to your attention send them a copy.
- Independent resource connections -- Relationships encompass more than you. If you find a solution to a customer or prospect's problem, connect the solution with them. It doesn't have to be your solution. It just needs to be a solution worth their consideration.
- Invitations - Invite someone to a ball game, a seminar or conference, or a round of golf.
- Connection dinner - Bring together people whom you know that don’t know each other, but they would benefit by knowing each other. Make it a dinner party.
- Breakfast or lunch - Schedule regular get-togethers with relationships that are important. No agenda other than to catch up with each other.
- Remembrances - Use your contact database to stay up to date on birthdays, personal anniversaries, work anniversaries, etc. Send personal emails, cards, or gifts.

Sales Activities

Sales activities are more detailed and focused. They relate to a specific situation or opportunity with a customer. These activities focus on moving the collaboration and solution development forward.

Sales activities usually involve the variables in The Trust Formula. You apply your advanced communication skills to help move a decision process forward. This could manifest itself in multiple ways. Your communication skills show the customer you really understand their situation; you explore their situation further with effective questions, listening and paraphrasing; you collaborate with tools such as Response Wizard or Best Current Thinking.

You demonstrate expertise by adding insights that help the collaboration and development of a solution. Experience with similar customers comes to bear, showing how your solutions can address the customer's concerns.

Demonstrated expertise and excellent communication skills can help reduce the customer's perception of risk, thereby building trust with the customer.

Collaborating with the customer is the key with sales activities. Have them work with you to develop a solution or an idea. By doing so they will claim at least partial ownership of the idea. When they own it, they are more inclined to buy it.

Marketing Activities

Marketing is about staying front of mind when you are not there. Marketing keeps your customers, desired customers, influencers, connectors, and the industry as a whole aware of who you are, and helps everyone begin to develop comprehension about what you do.

If you are part of a larger company that has its' own marketing department, connect to the marketing people. Develop a relationship with them and help them understand what you are doing from a relationship perspective. Collaborate with them on how to best leverage all of their work in marketing the company. How can you and they take a corporate marketing effort and focus it down to individuals?

If you are a small business or on your own, marketing should become part of the overall activities you undertake to promote and grow your business. Finding time to undertake some type of marketing activity creates familiarity. It also is a means to establish expertise, which is an important component of the Trust Formula.

In the next section we will go into more detail about the role of marketing and the variety of activities you can choose from to market yourself and your company.

In the context of building activity plans, think about marketing activities as a repeating series of tactics that communicate your message. Schedule activities that keep you, your firm and your message in front of your contacts.

Turning Relationships into Revenue

An occasional concern for those who practice advanced communication skills is the reluctance to take advantage, the concern over being manipulative. There is a great investment in building a relationship — on both sides. There is trust built over time. Capitalizing on a relationship for a deal can feel as if you're tarnishing the relationship. It can feel as if you are taking advantage of the trust that someone places in you.

If this consideration crosses your mind when working with a customer, think about the *"Family Member Standard"*.

If you find yourself at this intersection of relationships and sales, think about a family member, a sibling or parent, whom you really care about and are close to. Would you feel good presenting this deal to the family member if the family member were in the same situation as the customer?

If the answer is no, reconsider what you are presenting. In a strong, healthy relationship generosity is the key, and helping the other person needs to be the mindset. When selfish motives take hold, the ability to trust someone can be put aside, and in some instances, take a hit. The motivation for a deal has to emanate from a desire to be generous and to help.

To get to this point requires an understanding of what the customer is dealing with; what are their challenges and concerns? As any great communicator will tell you, seek first to understand. Once you know what the other person is experiencing and what is motivating them, you can then contribute value. Your products, services and solutions might be just the

Shame on you if you have a solution that can help and don't present it because of fear of harming the relationship.

answer the customer needs to overcome a problem. Don't let a fear of tarnishing a relationship get in the way of improving a relationship.

To turn a relationship into revenue you need to ask for the business. Over the course of time the customer learns more and more about what you do. As an astute observer and communicator, you learn over time more and more about the challenges and issues the customer is facing. Bring the two together with a simple statement/question such as: *"As I hear you describe your cost overruns on the floor, I'm thinking our operator training solutions might be a good fit. What do you think?"*

Two things about this question. 1. Using "I" instead of "we" personalizes it. 2. It is open-ended, and should be left that way. Don't be tempted to add a follow-on such as a full description of your training program, with all its features and benefits. Hold off and find out where he's at. He'll be able to let you know because you asked an open-ended question. In this way, you invite a wide array of responses. And you also avoid his saying, "no." So it is a good test of how receptive the customer is to moving on to a deal.

Turning relationships into revenue is a matter of focus, generosity, and asking for an opportunity when appropriate.

1. Identify the relationships where you think the probability of a sale is high.
2. Research those relationships and be generous with them, demonstrating expertise and connecting with the person on both a business and personal level.

3. Ask for an opportunity, or even offer a solution when the offering is spot-on; something you would comfortably offer to a family member in the same situation.

If you do these things you will find that doing business together will strengthen a relationship.

Activity Tools

Here are three tools that can help as you work on your activities and relationships:

- Relationship Activity Planning Sheet
- Profile Sheet
- Pre & Post Meeting Planning

Take the time to plan.

The payoffs are huge.

Relationship Activity Planning Sheet - a single page that describes what specific activity you will undertake for a specific relationship. Part of the value of using this form is that over time, you will have a useful log of your relationship.

Relationship Activity Planning

Contact person: ______________________________

Company: ________________________

Action:________________________________By date_________

Notes for this action:

Profile Sheet

The profile is a single page reference document for each of your relationships. On the sheet is all of the essential information you need, at a glance, to assess where you are in a relationship. Included are:

- Relationship name and contact information
- Stuff you know – family, interests, passions, fears, vulnerabilities
- Nature of relationship, e.g. customer, connector, influencer
- Status of relationship – your position on the relationship ladder (1-5)
- Current selling mode with this customer (if it's a customer)
- Business you've done together – products and services sold
- Why they bought – practical value of solution, risks addressed / anxieties reduced
- Answers to the questions about what's working in the relationship.
- Next steps – opportunities under discussion, changes to relationship status, changes to selling mode

Sample Profile Sheet:

Who to Who Relationship Profile Sheet

Name, Company & Contact Information	Sam M., Sr. VP, National Bank; Married; 2 children (2nd yr. college and H.S. senior); W. Htfd.; proud of home (remodeling kitchen, landscaper); foodie; loves wine; travels for the food and shopping
Nature of relationships, e.g., customer, prospect, connector, influencer	Sam is a friend and client. Our conversations are business, personal, and career oriented. We meet monthly to just meet and talk.
Strength of relationship rating (1 commodity to 5 trusted partner)	5 Importance, 4 Strength - Sam shares freely, as do I. However, conversation is 80% business topics
Business you've done together – products, services, solutions, referrals, generosity	Workshops, training of his team members. General counsel on career issues and the politics of his organization. Generous with ideas, books, articles, etc.
Why they bought – practical value of solution, risks addressed, anxieties reduced	Per Sam - last two years have been sub-par performances. Need to turn it around in 2015 His people need to establish and own their position in the marketplace. They currently pitch deals. Relationships need to become more prominent in their thinking. H2W training will help his team adopt a relationship focused approach
Next steps – opportunities under discussion, changes to relationship strength, changes to selling mode	Opportunity #1 - conduct refresher workshop with Sam's CT team Opportunity #2 - expand training to entire Southern N.E. team serving the middle market client base Opportunity #3 - Work one-on-one with Sam to help him enhance his coaching skills Sam and his wife are foodies. His closest friend Ed (and Ed's wife) are foodies. Ed is also a prospect. Find an exceptional restaurant and have the six of us get together for dinner.

Questions to consider in determining what makes this relationship work	
What are 3 key things you understand about that person?	Sam appears ambitious Sam appears overtly confident With confidantes Sam's insecurities come to the surface Sam is under a lot of pressure because last two years have been sub-par performances. He needs to turn it around this year.
What, in your view, makes this relationship really work?	Honesty Generosity with ideas to help his team Trustworthy - Sam's confidences to me stay private.
What does this person offer you that makes the relationship important to you (other than revenue)?	I like Sam I learn from Sam regarding relationships, the marketplace, and the escalating degree of competition that is occurring
What do you offer in this relationship that makes it work for the other person? If possible, ask the other person this question.	Creative ideas Little things that help immediately Honest feedback A solution to increase the team's performance and separate them from competitors

Pre & Post Meeting Planning

Pre-Meeting - Clearly determine the purpose and desired outcome of a meeting before you begin the meeting. Pre-call planning provides clear goals and supports appropriate actions. As you prep for a meeting refer to your Customer Profile Sheet. Assess where you are in the relationship and where you want to go next.

Post-Meeting - De-brief on the planning questions immediately after you leave a meeting.

Starting with your Profile Sheet:

1. **What is the current status of our relationship?**
    - Where am I on the relationship ladder? E.g., if you are at 2, what you might do to move the relationship towards 3?
2. **What do I understand about the other person's situation; their anxieties and risks?**
    - Determine what else I'd like to learn about the person.
3. **How do I interact with this person?**
    - What is my selling mode? Look for ways and means to enrich the relationship.

These first 3 questions position your approach to the meeting.

4. **What's the purpose? What else do I want/need to learn?**
    - Do I need to know more about the organization, the issues, the players, the context, or…?
5. **What's happening in the world of this contact right now?**
    - Any big events, organizational changes, family issues, business challenges, etc? What might have changed since the last time we met?
6. **What solutions can I present?**

- The solution may or may not relate to the business issue your product/service provides. The solution may be an article, a book, or an offer of an introduction. Once you've considered changes in your contact's world, you may come up with a possible solution to present.

7. **What's your desired outcome of this meeting?**
    - It's smart to state your objective at the start of the meeting, and ask your contact what they'd like to accomplish in this meeting. This gives you the opportunity to adjust rather than plowing ahead with only your needs in mind (discount?). It also gives you insight into where they're at right now and maybe what's new. Note: It's smart to close every meeting asking how they feel the meeting went.

Answering these questions gets your mind focused for effectiveness. You know where you stand; you've considered what may be going on for your contact; you know what you want to accomplish. With these things sorted out, you can focus on the relationship.

Sample Call Planning Worksheet:

Who to Who Pre-Call Planning Sheet

Sam M. / 23 January 20XX

What is the purpose of the meeting? What do I want/need to learn?	Our monthly lunch Feedback on performance of team members who have been trained; do a refresher workshop Updates on career issues and decisions Discussion on expansion of training to all of Southern N.E. Invite Sam & wife and Ed & wife for "foodie" dinner experience
What are this person's issues, priorities, challenges, RIGHT NOW?	Demonstrate that past two years of sub-par performance will turn around 180 degrees in 2015 Coach his team members to do the relationship building things they need to do
What solutions can I present, either mine or someone else's?	Refresher workshop with his entire team Coaching program with Sam
What is the desired outcome of the meeting?	Agreement on workshop program Acceptance of dinner invitation

Weekly Review Sessions

Weekly reviews are the moments when you take a breath and assess progress. We suggest conducting these meetings, regardless of whether it is just you or a team.

For most businesses the weekly review session is a normal operating procedure; particularly for the sales team. The discussions are usually dominated by project reviews, status updates, project forecasts, proposal status, projected revenue, forecasted close date, billable hours or whatever metric the firm uses to measure success.

All of this information is important and valuable. After all, nothing happens until someone sells something, and in order to effectively and efficiently run a business, leadership needs to know what is being sold; how much, when and to whom.

When doing a weekly review, consider adding one additional element to the mix - the relationships.

The typical sales by numbers approach exhibited in most sales team meetings and reviews is a means of managing your business in order to grow it. By adding relationships to the mix you focus on managing the relationships that will grow your business. When you do this, the sales opportunities follow.

Incorporating relationships does not mean loosening or abandoning accountability. Relationships are typically considered a “soft” element that defies ways to measure them. Counter that perception. In the next sales meeting ask the following:

- Tell me about your relationship with Harry. How strong is the relationship? How would you rate the level of trust and openness Harry has with you on a scale of 1-5?
- Tell me about the other relationships you have in Harry's company? Who are they with? How strong are they?
- Are there any resources you need to build this relationship?
- Who do you want to meet in order to find opportunities for new business?
- Why are they at the top of your priority list in terms of new prospects and connections?
- How will you connect with them? Is there a warm introduction source available?

Assess and discuss the strength and importance of each relationship across several constituency groups, including existing customers, desired customers, connectors, and influencers.

Discuss specific plans for each relationship. What activities will take place that further the relationship? What acts of generosity can be done that reflect an understanding of the other person's situation, and offers something that can help, regardless of source?

Then, incorporate the opportunities. What are the client and desired client situations where our products and services make sense? Why do we make sense as a good solution?

What steps will take place in order to work with the client or prospect in developing the solution in a collaborative manner? The goal is to enhance the trust and strength of the relationship by having the client work with you in developing the ideal or optimal solution. In this way they've already bought the answer instead of having to be sold the answer.

Stop managing your business in order to grow it. Manage relationships that will grow your business.

