

The Journey to
"Yes!"

The Author

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With over 35 years in business, first in Banking and then in Information Technology I have dealt with many of the largest companies in the UK - major high street names.

During those years I have learnt how to present information and ideas and get them accepted!

The manual is aimed at bringing together all the lessons learned and best practices gained in successfully dealing with those companies

It's a competitive jungle out there - and you need all the help and pointers you can get!

Contents

OBJECTIVES

SECTION A - MARKETING STRATEGY

A-1	FAQs Regarding Marketing Strategy.....	5
A-2	Extra Thoughts on Marketing Plans.....	13

SECTION B – TELEPHONE SALES CALLS

B-1	Target Contacts.....	20
B-2	Critical Steps	26
B-3	Essential Skills	27

SECTION C – WRITTEN COMMUNICATIONS

C-1	Letter Writing Checklist	31
C-2	Business Writing - A B C.....	32
C-3	By email	34
C-4	Proposals.....	35
C-5	Proposal Best Practice Guide.....	37
C-6	Essentials for Written Proposals.....	38
C-7	The Language of Pitching.....	62

SECTION D - VISITS & PRESENTATIONS

D-1	Planning the visit.....	83
D-2	Sales Pitches and ‘Beauty Contests’	84
D-3	Communication Skills Checklist	85
D-4	Style	86
D-5	Asking Questions and Listening	87
D-6	Range of Questions.....	89
D-7	Handling Questions.....	92
D-8	Assertiveness	93
D-9	Presentations	95
D-10	General Concepts of Presentation / Delivery	97
D-11	Structure of the Presentation.....	102
D-12	Fees and Charges	107

SECTION E – ACCOUNT DEVELOPMENT

E-1	Purpose	112
E-2	Scope.....	113
E-4	Stage: Plan	116
E-5	Activity: Prospect	117
E-6	Stage: Opportunities.....	119
E-7	Activity: Capture	120
E-8	Stage: Firm Leads.....	122
E-9	Activity: Sell.....	123
E-10	Stage: Nearly sold	125
E-11	Activity: Respond	126
E-12	Stage: Contract	128

Appendix A	Marketing Plan Outline	134
Appendix B	Opportunity Evaluation	137
Appendix C	Presentation Assessment	140

OBJECTIVES

The book is aimed at all levels of business, whether you are just starting out and need to know ‘the rules’ or whether you are an experienced, hardened professional who could do with a refresher on some of the basics.

The objective of “The Journey to Yes!” is to sharpen your skills and broaden your client base by winning business from new clients and *growing* that business. As you move through the book it will help you to build confidence that you are approaching the issues logically and systematically, covering:

- | | |
|--------------------------|---|
| <i>Marketing</i> | How to go about developing a Marketing Plan, <i>and making it work.</i> |
| <i>Developing</i> | Effective telephone skills, both in cold calling and enquiry handling.
Learn simple skills for active listening! |
| <i>Writing</i> | Letters and proposal documents that are clear, focused and customer centred. |
| <i>Selling</i> | Your products and services in a professional and appropriate manner.
<i>Getting the pitching skills right!</i> |
| <i>Delivering</i> | High impact client presentations and pitches. |
| <i>Overcoming</i> | Inertia that may prevent customers switching their existing supplier in favour of yourself.
Moving them from interest to commitment! |

It is meant less as a narrative and more of an easy-to-look-up series of pointers and checklists. It is not meant to be exhaustive, but provides the key issues to take on board when developing your business.

Good Luck!

SECTION A: MARKETING STRATEGY

According to the UK Chartered Institute of Marketing “*Marketing is the management process responsible for identifying, anticipating, and satisfying consumers’ requirements profitably*”

In essence marketing is about matching consumer needs with those of a commercial business, ie the business needs willing consumers in order to survive.

The marketing of products and services is seen as a means to promote a company name, image and boost sales.

The implementation of a marketing strategy does not automatically ensure better profitability, but the aim of the strategy should be to bring about greater sales over a long-term period.

A-1 *FAQs Regarding Marketing Strategy*

1. *How are the terms marketing objective, marketing strategy, target market, marketing mix and positioning defined?*

- a. Marketing objective: a measurable goal that an organisation attempts to achieve for a target market within a specific time period, typically one year.
- b. Marketing strategy: the selection of a course of action from among several alternatives that involves specific customer groups, communication methods, distribution channels and pricing structures.
- c. Target market: a market segment selected by an organisation for marketing attention.
- d. Marketing mix: the controllable factors, including product, price, place, promotion, packaging, programming, people, and partnership that an organisation selects to satisfy customer needs.
- e. Positioning: the development of a service and marketing mix to occupy a specific place in the minds of customers within target markets.

2. *Why are marketing objectives so important in effective marketing?*

Marketing Strategy

- a. Effective marketing cannot occur without explicitly stated objectives. They are a specific statement of what the organisation wants to achieve in an upcoming period of operations (Where would we like to be?)

Objectives form the foundation for the marketing plan (How do we get there?) They provide the basis for controlling and adjusting the marketing plan during its implementation (How do we make sure we get there?)

Marketing objectives also serve as the measuring sticks against which actual marketing performance is judged (How do we know if we got there?) Finally, they provide a historic record of marketing successes and failures that can be used as an initial basis for setting new sets of objectives (Where are we now?)

3. Which five requirements must market objectives satisfy?

All marketing objectives should follow the **SMART** acronym:

Specific
Measurable
Achievable
Realistic
Timed

4. What is a segmented marketing strategy?

Segmented marketing strategies are approaches that recognise differences between target markets by using individualised marketing mixes for each of the target markets. Also known as differentiated marketing strategies these include three of the four broad strategy approaches (single target market concentrated, and full coverage).

5. What are the four alternative marketing strategies and how do they differ?

The four alternative marketing strategies available are:

1. Single-target-market strategy
2. Concentrated marketing strategy
3. Full-coverage marketing strategy
4. Undifferentiated marketing strategy

One of the main differences is that the first three approaches are all examples of segmented (differentiated) strategies, while the fourth approach is one that overlooks segment differences.

Marketing Strategy

The first three differ in terms of the number of market segments selected as target markets. The single-target-market and full-coverage approaches represent two extremes: the first involves the selection of only one target market while the other targets all the market segments available to the organisation.

The concentrated approach falls somewhere in between single target market and full coverage. It involves targeting two or more, but not all, of the available market segments.

6. *Should marketing strategies be changed in the four stages of the product life cycle? if so, which strategies work best during each stage?*

Yes, marketing strategies should be changed because the effectiveness of different approaches varies with product life-cycle stage.

The optimum strategies vary according to the type of service or product, the competitive conditions the individual organisation faces, and its position in the market. No one strategy works best in each of the four product life cycle stages. Rather, there are several alternative approaches that can be used. These are:

1. Introduction Stage (for the company or companies first introducing the service – the “pioneers”):
 - a. Rapid-skimming strategy
 - b. Slow-skimming strategy
 - c. Rapid-penetration strategy
 - d. Slow-penetration strategy
2. Growth Stage (for the company or companies that pioneered the service):
 - a. Improving service quality and adding new service features and service elements
 - b. Pursuing new target markets
 - c. Using new channels of distribution
 - d. Lowering prices to attract more price-sensitive customers
 - e. Shifting some advertising emphasis from building awareness to creating desire and action (purchase)
3. Maturity Stage (for all companies / organisations):
 - a. Market-modification strategy
 - b. Product-modification strategy
 - c. Marketing-mix-modification strategy
4. Decline Stage (for all companies / organisations):

Marketing Strategy

- a. "Milking" (reducing costs to a minimum)
- b. Selling out to someone else
- c. Finding new uses (start another product life cycle)

7. ***Should smaller or lower-share organisations use the same marketing strategies as industry leaders? If not, how should their approaches differ?***

No, smaller and lower-share companies should generally *not* use the same marketing strategies as the industry leader. These companies have more limited resources than the leader and have less market "power".

Normally the market leader is not only the organisation with the largest share of the market but also the one with the largest marketing budget. The leader often uses a full-coverage strategy or targets the majority of the available market segments. Staying at the top is its biggest challenge and this can be done by using one or more of the following three approaches:

- (1) expanding the size of the total market
- (2) protecting market share
- (3) expanding market share

The market challengers are those organisations in 2nd, 3rd, or 4th position in terms of market share. They usually have sufficient resources and "power" to mount direct challenges at the leader. They can do this through one of five approaches that draw on military terminology:

- (1) frontal
- (2) flank
- (3) encirclement
- (4) bypass
- (5) guerrilla attacks

The focus in each of these is definitely on how to draw market share from the leader to the challenger. The remaining two industry positions truly represent the smaller and lowest-share organisations. The approaches that work best here are ones that avoid direct confrontation with the industry leader and its challengers

Market followers mimic the approaches of the leaders and challengers; targeting the same target markets, doing the same types of promotions and providing the same types of services (obviously on a somewhat lower scale). The market niche tends to be even smaller than a market follower. Unlike a follower, the niche does not follow the leader's actions so closely. It pinpoints a specific target market or markets and specialises in serving the needs of that market(s).

8. *What are the concepts of relationship marketing and strategic alliances? Are they related?*

- a. Relationship marketing: A marketing principle that emphasises the importance of building long-term relationships with individual customers and with other organisations.
- b. Strategic alliances: These are special long-term relationships formed between two or more organisations.
- c. Yes they are related concepts: A strategic alliance is a form of relationship marketing.

9. *Why has positioning become so important in today's business climate?*

There are three main reasons why:

Perceptual processes: the growing acceptance by marketers that clear, simple, and concise messages are the key to getting through customers' perceptual defences.

Intensified competition: business is becoming more competitive each year: positioning is a technique that can be effective in making the organisation stand out among its competitors.

Volume of commercial messages: the number of commercial messages to which customers are exposed increases each year; positioning helps the sponsor's messages stand out in the growing "clutter" of these messages.

10 *What information and steps are required for effective positioning?*

Four types of information are essential in arriving at the most effective positioning for the organisation. They are:

1. Information on the needs of customers in target markets and the benefits they look for
2. Knowledge of the organisation's competitive strengths and weaknesses
3. Familiarity with competitors' strengths and weaknesses
4. Information on how customers perceive the organisation relative to competitors

The steps involved for effective positioning can be described through the "five Ds of positioning" concept:

Marketing Strategy

1. Documenting: identifying the benefits most important to customers
2. Deciding: deciding on the image that the organisation wants customers to have
3. Differentiating: identifying the organisation's main competitors and the things that make it different from these competitors
4. Designing: developing the services, facilities, and communication messages that support the positioning selected
5. Delivering: making good on what's been promised

11. What are the six positioning approaches?

1. Positioning on specific product features
2. Positioning on benefits, problem solution, or needs
3. Positioning for specific usage occasions
4. Positioning for user category
5. Positioning against another product
6. Positioning on Product class dissociation

12. What are the Top Ten Strategic Marketing Aids?

- 1) THE GOLDEN RULE:
OBJECTIVE, STRATEGY, EXECUTION
the fundamental 3-stage Model, applies "always and everywhere"
- 2) SWOT ANALYSIS
a good all-purpose diagnostic tool, can be dynamic as well as descriptive
- 3) GAP ANALYSIS
identification of the shortfall between desired outcomes and current activities
- 4) STEEP ANALYSIS
scanning the "far" environment. The extra "E" from the more usual STEP (or PEST!) model is "Environment"
 - *SOCIAL* - What are the current consumer trends?, How can your business exploit them? What are current consumer pressure groups re-acting to?
 - *TECHNICAL* - How is your business exploiting technology to achieve growth? Is it through improving efficiency? Or is it through using technology to aid new product development?

Marketing Strategy

- *ECONOMIC* - What is the current economic climate like? How will this affect business turnover? What measures are you taking to ensure it does not adversely affect your business?
- *ENVIRONMENT* – What are the current thoughts on what you are trying to sell? Is it considered ‘a good thing’ for the environment?
- *POLITICAL* - Which political factors are important to your business, and need observing? What is the current legislation? Has your business achieved / aiming to achieve all the requirements?

5) PORTER'S FIVE FORCES & VALUE CHAIN

an "outside-in" strategic approach strategy focused on analysing the essentials of competition. The five forces model is in essence an extension of the SWOT and STEEP (PEST) analysis.

- Suppliers
- Substitutes
- Competitors
- Buyers
- New entrants

Although the Porter's five forces model may at first appear rather simple, once the information it requires is collated, it will provide valuable information.

Porter does extend his five forces model by discussing '*barriers to entry*' which could prevent the emergence of competition within any given market:

- *ECONOMIES OF SCALE* - This is based on the assumption that the more a product is produced with the same fixed costs, the cheaper the cost per part produced arises.
- *THE CAPITAL COST OF ENTRY* - Effectively the costs of setting up and entering a market.
- *ACCESS TO DISTRIBUTION CHANNELS* - Based on the logic that the more distribution channels exist then the more that marketplace will be open.
- *COST ADVANTAGES INDEPENDENT OF SIZE* - It is difficult for a competitor to break into a market if there is an established operator who knows the market well and has good relationships with buyers and suppliers.
- *LEGISLATION* – which may affect the strategy.
- *DIFFERENTIATION* - The difference between one product and another.

Marketing Strategy

- 6) **RESOURCE-BASED STRATEGY**
an "inside-out" approach based on a firm's unique resources and capabilities.

- 7) **THE MARKETING MIX**

These are the four key areas that need addressing in order to achieve a successful marketing campaign:

PRODUCT - Quality, style, special features, packaging, guarantees, in essence the product itself and after sales package.

PRICE - Financial criteria in relation to competitors in the marketplace.

PROMOTION - How the product is communicated to consumers via advertising, sales promotion, merchandising.

PLACE - This covers where the product is sold and how it reaches the marketplace.

- 8) **SEGMENTATION**
identifying subsets of the market and serving their needs, many points of departure.

- 9). **THE ANSOFF MATRIX**
... **Ansoff's Matrix** - Planning for Growth. This well-known marketing tool was first published in the Harvard Business Review a generalised guide to basic marketing strategy

- 10). **THE BOSTON MATRIX**
The product lifecycle analysis shows us that all products will have a limited life span where the greatest gains come from when products are at the maturity stage. The Boston Matrix analysis extends the analysis further.

A-2 *Extra Thoughts on Marketing Plans*

What's in a Marketing Plan?

You may be called upon to participate in developing a Marketing Plan / strategy for your organisation at some stage. Marketing helps a business identify market awareness, and thereby channel itself into areas where it can increase sales.

Any marketing strategy should be:

1. Measurable
2. Communicable
3. Realistic
4. Affordable

Here are some thoughts that will help you along this process.

a) ASPECTS OF AN EFFECTIVE MARKETING PLAN:

• Fact-based	• Flexible
• Organised & co-ordinated	• Controllable
• Programmed	• Internally consistent and interrelated
• Budgeted	• CLEAR & SIMPLE (but not too simple!)

b) MARKETING PLANNING BASICALLY COVERS FIVE QUESTIONS PLUS THE TOOLS TO ANSWER THEM:

<u>THE QUESTIONS</u>	<u>THE TOOLS</u>
1) Where are we now?	The Situation Analysis
2) Where would we like to be?	SMART Marketing Objectives
3) How do we get there?	Marketing Strategies: Generation, Evaluation & Choice
4) How do we make sure we get there?	Monitoring & Control

Marketing Strategy

5) How do we know if we got there?	Evaluation
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c) THE TOP TEN MARKETING-PLANNING PITFALLS (PIERCY 1994):

ANALYSIS instead of PLANNING	Danger of overloading the plan with analytical techniques and models.
INFORMATION Instead of DECISION	Too much data, too few decisions
INCREMENTALISM	Relying too much on last year's plan
VESTED INTERESTS	Plans watered down or side-tracked by powerful individuals or hidden agendas
GROUPTHINK	Plans limited by inward-looking or culturally limited attitudes
RESISTANCE TO MARKETING	Other departments or professions resist the customer-based approach
NO OWNERSHIP OR COMMITMENT	Plans produced but no senior champion too see that they work
NO RESOURCING	Blocking via limiting or refusing necessary resources to implement
NO IMPLEMENTATION	Plan leads to nothing more than a report on a shelf
DIMINISHING EFFORT AND INTEREST	Where plans simply become an annual ritual and managers perceive this.

From this, organisations need to address three dimensions of the Marketing Planning Process to be effective - The Analytical, Behavioural and Organisational dimensions.

**d) PLANNING IS HIERARCHICAL:
CLARIFY THE LEVEL YOU ARE DEALING WITH.**

The hierarchical nature of planning, particularly in large organisations, can lead to confusion.

Remember that:

The Corporate Plan: covers the whole enterprise and all its functions. It is concerned with defining and directing the company's course over a number of years. This plan makes strategic decisions about the acquisition and deployment of assets in pursuit of corporate goals.

Marketing Strategy

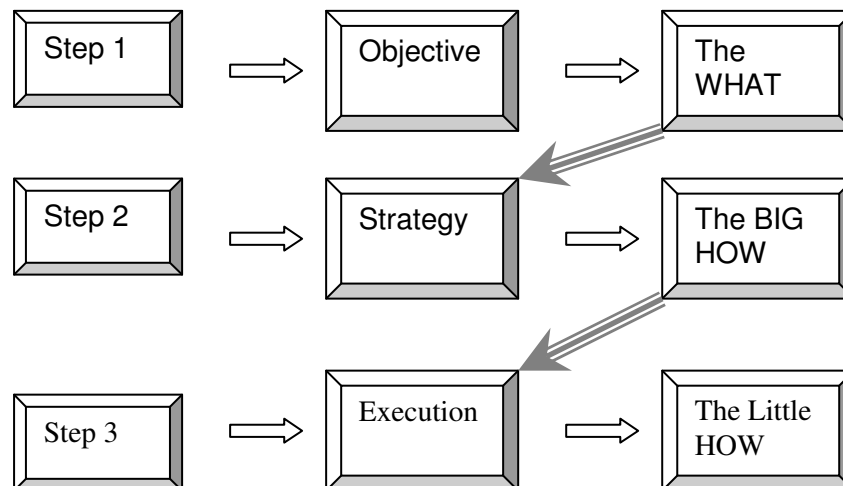
The Strategic Marketing Plan: brings together Business Unit plans and may involve portfolio analysis at a sophisticated level. It is an input into the Corporate Plan.

The Business Unit Marketing Plan: encompasses product and market decisions in coherent and viable units with their own customers and competitors. Business Units are definable, separate businesses, able to identify costs and revenues clearly.

The Operational Marketing Plan: deals with objectives, strategies and marketing mix decisions for specific products or services over a limited period (usually a year). The plan is devised and controlled by a Product Manager (or similar function) and builds with others into the Business Unit plan.

e) THE "GOLDEN RULE" IS ALSO HIERARCHICAL: - ELEMENTS CAN CHANGE WITH CONTEXT.

In Marketing Planning, the "Golden Rule" of Objective, Strategy and Execution applies "always and everywhere" when devising effective activities. As one level of planning gives way to another, or as one activity is an input into another, the objective of that activity can become strategy for the next level - and so on.



f) "OUTSIDE IN" VERSUS "INSIDE OUT" MARKETING STRATEGY.

There is a debate about whether strategy should be an "outside-in" process, an "inside-out" process or a mixture of both. The former

Marketing Strategy

view is of a market and external environment focus to competitive advantage famously espoused by Michael Porter with his "Five Forces" model. More recently, Grant (1991) et al focuses on internal company resources and unique capabilities matched to opportunities in the external environment. He argues:

"There is a key distinction between resources and capabilities. Resources are inputs into the production process...A Capability is the capacity for a team of resources to perform some task or activity. While resources are the source of a firm's capabilities, capabilities are the main source of its competitive advantage".

Which of these perspectives is most appropriate for you? - ***but don't forget the customer.***

g) WHAT ARE YOUR PRODUCTS?

You might be familiar with Kotler's "Three Level Analysis" of product: the CORE, ACTUAL and AUGMENTED elements. It will be useful to use this tool to define your most important service "product" before we start on the plan itself.

You will probably have identified several potential service products in your Division, only one is required for this exercise. Take time to think about this and document it.

<u>The Core Benefit?</u> (what are they <u>really</u> buying?)
<u>The Actual Product?</u> (this is the physical product itself)
<u>The Augmented Product?</u> (this includes add-ons & after sales service)

h) KEY STEPS IN MARKETING PLANNING.

To begin focusing on the Plan structure, it will be useful to pick out six of the main steps in a simplified way.

Remember; keep it as simple as you can. As a guide, imagine that you are explaining the point to a non-technical "salesperson".

1) THE BUSINESS PLAN FOCUS

Give a short business definition of your Division. It should include:
Customer Groups served - Customer needs addressed - Technology used in the service.

2) THE MARKETING AUDIT

- a). From your thoughts of "where we are now", note down the *two most important* audit factors from the external and internal environments
- b). Create a short profile, or "thumbnail" sketch of your most promising type of external customer. *How would you know a good prospect if you saw one?*
- c). Create a similar profile of your most potent competitor - again a type not a company

3) THE SWOT ANALYSIS

Stick to the four or five main items only. For the Weaknesses and Threats document *how* you plan to counter these.

- **STRENGTHS & WEAKNESSES** - These are internal factor to your business. Ask yourself what are your biggest business weaknesses that need addressing?
- **OPPORTUNITIES & THREATS** - These are external factors to your business, but within the same market (you're looking at your market in relation to competitors). What areas in the market need exploiting for your business to attain growth?

Marketing Strategy

Strengths	Weaknesses
Opportunities	Threats

4) TARGET MARKETING

Look again at your potential external customers for the most important of your “products”. Note what they have in common. (ie apply segmentation and choose the most attractive options.)

5) OBJECTIVE SETTING

SMART objectives (Specific, Measurable, Achievable, Relevant, Timed) are vital to your plan. *Document* your key Marketing Objectives for your most important "product".

6) THE MARKETING PLAN MIX

The four Ps of marketing are: Product, Price, Promotion, Place (there may be others too!) Decide which order is the most important for your plan - and why.

IN CONCLUSION.

Understanding the Marketing Planning process is a crucial element in the future success of your organisation. Taking on board the above lessons means you are making a solid start here!

SECTION B – TELEPHONE SALES CALLS

B-1 Target Contacts

How to Find Out Who Your Target Contact Is

Before you can expect to locate your target prospect, you will need to have a target title to focus toward. This can be either an industry-accepted title (such as “Controller” for accounting) or you can simply ask for the head of that particular department. For example, if you are an accountant seeking a position in corporate accounting, you could either ask for the name of the Accounting Manager or ask, “Who is the manager of your Accounting Department?”

Once you have established the target title, you need to find out the specific name and title of your target contact at your target company. If you have already received this information either via your research or through a contact referral, you are ready to go on to the next step.

Either use the Internet to gain more information on your targets or you can ‘buy-in’ lists from specialist companies, narrowly defining your search criteria.

The Switchboard Approach

The simplest way to get the name of the manager from the company is to just phone and ask! Call the company's main switchboard number and ask, “Can you please tell me the name of the Manager?” About 50% of the time you will get all the basic information you need!

If the switchboard operator asks, “Who is calling?” just give your name and nothing else. If asked, “What is this in reference to?” or “What is this information for?” you should respond, “I’m sending correspondence to this person and I’d like to make sure the name, title and spelling are correct. If you are given the person's name, make sure to ask for the correct spelling, the person's exact title and direct phone number or extension.

And if the switchboard approach doesn’t work for you, read on.....

More Ways To Find Out Who Your Target Contact Is

If you can't get the information you need directly through the switchboard, try the following additional methods:

1. When dialling the company, ask for the department, then ask the first person who answers. Department workers typically do not screen as heavily and may be more willing to provide the

information.

2. Ask for the Personnel / Human Resources Department. But watch out! They are usually quite good at screening and may try to direct you straight to them. If so give a polite "Thank you" and try another method.
3. Tell the switchboard operator "I'm updating my mailing list. Is your address ____? And your post code? And who is your Manager?" Sometimes by asking the key question *after* other questions you may be given the information, but don't lie in using this approach (example: 'I'm calling from XXX magazine and would like to send a free copy to your XXX.'). That's a ruse - it's unethical and dishonest, so don't do it.

How to Get Past the Guardian Of The Gate

Every company has its "Guardian of the Gate" - a person who rises to the level of mythological beast when you are trying to get through on the other end of the phone. As hard as we may try to get inside, this person keeps cutting us off. "Who is calling?" "What is this regarding?" "I'm sorry, but we don't have any need at this time," "Just send your information and they will call you if there is any interest." Whew! Anyway, they can be a real pain when you are trying to get to the relevant manager. Here are ways to get past them:

The 7:30 / 12:30 / 5:30 Rule Technique

The best way to get past the Guardian of the Gate is to avoid her altogether! The 8:30 / 12:30 / 5:30 Rule states that if you call either early in the morning, during lunch, or late afternoon, you will likely get someone who is not nearly as good at screening as the person that normally screens the calls. You can often gather all the information you need since this person is not a true Guardian of the Gate.

This is also an excellent approach in reaching a manager who has been hitherto inaccessible. Why? Because if you are in management, you likely either start early, work through lunch, or work late (or all three). And many managers end up answering their own phone at those times. For all they know, it's their spouse calling to ask them to pick up something for supper!

The Everyone Loves To Hear Their Own Name Technique

If perchance, the Guardian of the Gate uses her own name in answering the phone, reply,

“Oh, hello, _____, this is _____
May I speak with _____?”

The sound of hearing their own name is a disarming tactic that will often send you through to your target contact.

The Ad Infinitum Call Waiting Technique

If you are told that your target contact is on the phone, simply reply,

“Oh, that's fine. Will you please put me through as soon as that call is completed?”

If the Guardian of the Gate says it may be awhile or that she already has other calls waiting, reply,

“Oh, that's okay - I don't mind holding. I'll be working on some papers while I'm on hold.”

The Spelled Name Technique

If you are making a second attempt to get past the Guardian of the Gate who previously asked for your name, when you recognize her voice, beat her to the punch of asking who you are by saying,

*“Hello, this is _____. That's _____ (spell your last name).
Could you please put me through to _____?”*

It's rather strange, but sometimes by spelling your name it disarms the Guardian of the Gate. They have to stop what they are doing and write down your name. And since you have called before, your name will likely be vaguely familiar, although they may not be sure when and where they heard it before. This is one time that having an unusual last name can truly work in your favour! Usually this will gain at least a check with the boss and sometimes can even fully unlock the gate. Try it!

The Importance of This Call Technique

The classic screening line from the Guardian of the Gate is:

“May I ask what this call is regarding?”

If you are calling based on a referral, you can either reply:

" _____ asked me to call _____ "

or

"This is a personal call." (If the referral is personal, not professional)

Otherwise, the best overall reply is:

"I was informed that I needed to get in touch with _____ directly."

The reply may sound nebulous at best - but amazingly it often works. A truly astute Guardian of the Gate, however, will follow with:

"Regarding what?" to which you reply:

"I was advised to only discuss this matter directly with _____."

How true! Who advised you to do this? I did. Here, and throughout this document. You have read it, so consider yourself advised. Stick to your guns, even during that uncomfortable long pause that you may be forced to endure. Sure, it all sounds like a game and in a way that is exactly what it is. Whoever has the most marbles in the end wins!

The Unanswerable Question Technique

Another way to get past the *"May I say what your call is regarding?"* screen is to ask an initial question that they will not be able to answer. If you have done your homework you should have access to the industry buzzwords that can make this a very valid inquiry, one that the Guardian of the Gate would not know the answer to.

The best way to structure this question is to ask a question that would further qualify your potential interest in the company:

"I needed to ask _____ whether your company is currently using either xxxxxxxxxxx or xxxxxxxxxxx. Can you help me?"

This technique is somewhat of a gamble. If your question is merely a ruse to get by the secretary, you may end up with your foot in your mouth. But if used intelligently, it can launch you through to the manager.

The Instant Best Friends Technique

If you are someone who has a gift for making friends with the friendless or have been known to strike up conversations with total strangers, feel free to reach out to make an instant friend. Most

Telephone Sales Calls

secretaries are open to casual talk now and then. An especially effective tactic is to ask for her advice on how to reach the manager. If you are sincere in your approach, you may gain an ally with the very person that was previously considered your greatest roadblock.

The Better Than Leaving A Message Technique or The Best Time To Call Technique

If you are told that your target contact is not available, Instead of leaving a message, it's better to reply:

"I may be difficult to reach today. Could you give me a time when it would be best to reach _____?"

"When do you think _____ would he available to take a call?"

Then let the person know you will call back and ask if they could please let the manager know you will be calling at that time. You are much more likely to get through. BUT!! Do make sure you make that call on time!

The Best Phone Mail Message

With the continued proliferation of phone mail / voice mail in most corporations, the odds are great that you will frequently find yourself leaving messages with this type of voice retrieval system. The good news is that almost all line managers review their messages personally (against having a secretary review them), so you have an excellent opportunity to plant the seed for a future connection. Here is the best message:

"Hello (target's first name), this is (your first name / last name). I can be reached at (your phone number) between _____ and _____ today. I look forward to talking with you then."

The only modification of this is when you are calling based on a direct referral, your message would be:

"Hello (target's first name), this is (your first name / last name), (referral name) asked me to call you. I can be reached at (your phone number) between _____ and _____ today. I look forward to talking with you then."

Then hang up. Short and sweet. This is not the time to give your full

Telephone Sales Calls

life story. You merely need to set the hook for a call back, nothing more, nothing less. If you make the mistake of making your "pitch" on phone mail, you will lose your chance for interaction in responding to their specific needs. By giving them minimal information, the manager will feel obligated to return the call. Who knows? You may be a customer or supplier phoning them. In 75+% of the cases, they will at least attempt to return the phone call.

Another response to the request from a Guardian of the Gate who wants to take a message is to ask whether the manager has voice mail. If so, asked to be put through to it. YOU dictate what goes into your message rather than the scribe at the other end of the line. Voice mail is always better than a scribbled note from a PA and typically has greater professional obligation for action.

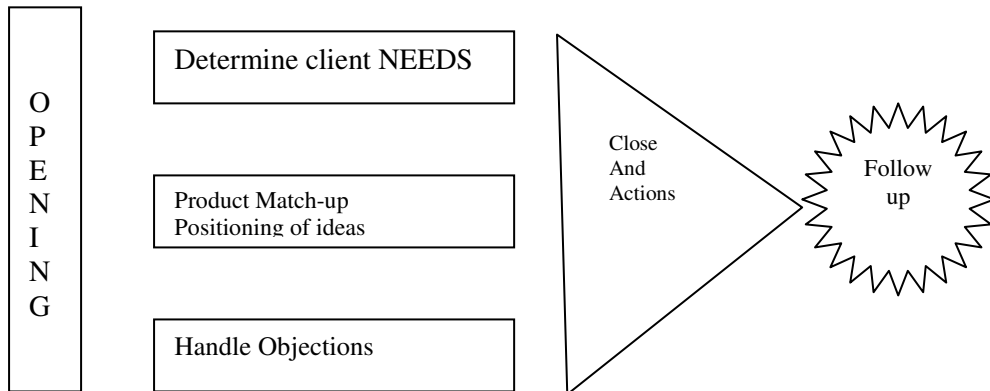
Three Strikes And You're Out

Please, please, remember that you definitely need a voicemail or answering machine to field calls when you are not in. Most managers will give up after three failed attempts. Even if they do get through to you on the second or third try, days or even weeks may have passed since the first attempt. Almost all managers have grown accustomed to "phone tag" and will gladly pass the baton back to you, possibly even giving you their direct line and the best time to reach them

B-2 Critical Steps

When you eventually succeed in getting through to your contact you need to make sure you make your pitch clearly and concisely – **plan you call before you make it!**

Use a mental or written diagram to map your way through the call:



B-3 Essential Skills

Presence

Presence is hard to define but it is real and it gets real results. It is the level of comfort and confidence you project. Your voice presence can have an impact on your telephone sales success. Voice presence is created by tone, pace, diction, pitch, inflection, level of enthusiasm, confidence, wit and the ability to think on your feet. Your presence helps instil in your customers a feeling that they can count on you, trust you. However it is hard to make dynamic call after dynamic call - so find some techniques that help you get 'pepped up' - standing up, a quick pace before a call, looking into a mirror, muscle flexing, repeating some positive action statements to yourself etc.

Presence is also helped by word choice eg if you say "I'm just calling about X", the word 'just' instantly serves to diminish the value of your call.

Relating

If you can't relate to your customers you won't sell to them. Relating is even more of a challenge over the phone. Knowing when and how to share information about yourself is also a part of rapport, but you need to know where to draw the line between what is friendship and what is business. Rapport is the state of feeling comfortable and confident with someone.

Having your customer's interest at heart, knowing what you are talking about, having integrity, not wasting your customer's time, delivering quality service etc. All this helps you earn good rapport. Finally, use 'thank you' to build rapport; 'thank you' for ringing back, for the information, for the order.

Questioning

Sales people who ask more questions get more sales, this is because questions help you to 'position'; tell your story from your customer's point of view. It is easy to fall into the trap of 'telling', but *how* you tell will be determined by what you ask and what you hear. Questions are the tool for getting at needs and getting a dialogue going. And, whoever controls the questions usually controls the call and thus the sale.

Questions can surface objections - then you have a chance to address them. The word '*why*' is a powerful selling tool!

Listening

Sales people can pick non-verbal clues such as tone of voice, emphasis and diction if they concentrate. Listening is even more important in telephone selling to gain as much as possible about what the client and the customer says, how they say it and what they do not say. Your customer's tones of voice (interested or disinterested), pace (relaxed or anxious), voice (positive or annoyed), demeanour (formal or friendly), or silence (thinking, negotiating) can often give you as much information about the customer as words or gestures.

Few people are naturally good listeners, here are some tips for developing your telephone listening skills:

- Do not interrupt
- Let yourself be interrupted
- Make an effort to focus on what the customer is saying.
- Take notes as you listen
- Underline words which your customers underline with their voices
- Listen for key ideas, concerns and words which are communicated and jot them down
- Listen for tone and pace and match both to become congruent with the customers, but do not mimic them
- Be careful when and how you use jargon

Positioning

Questioning, listening and of course homework will help you develop the information you need to position your story so that you can tell it from your customer's point of view. Positioning is truly the super skill. By knowing the customer's perceptions, preferences and needs you will be able to aim your product or idea accordingly. It is the fit with the customer's need plus the value added (quality, service, experience that differentiates companies today).

Product knowledge plays an important part in positioning. However, the first and most important sales rule is to *know the customer's situation and needs* before talking product. Then use the features and benefits that are relevant to the customer. To help you position your product over the telephone:

Telephone Sales Calls

- Play devil's advocate before you pick up the telephone and ask yourself "what's in it for the customer?"
- Come up with three compelling reasons why this customer might be interested in your product. But remember to use the reasons one at a time and to check (question) before and after each one
- Do your homework on your customers and their organization
- Know your product and benefits so you know what you are talking about
- Tailor your statements and questions to the customer you are approaching. An engineer may want to know details on how things work, but a purchasing manager may want to focus more on price and guarantees
- Use your features and benefits one at a time (at most two at a time) and check for feedback
- Use benefits early or your customer is likely to say, "Listen, I've got to go."
- When you don't have an answer, say, "Let me look into that. What specifically ...? When"
- Be selective. You have limited time over the telephone, so select key features and benefits and present them with an eye toward what the customer wants to do
- Link features with their benefits by using words such as 'which means', so that it equates features with benefits
- Listen to what your customers say and incorporate their ideas into your responses
- Take notes as you listen so that you can incorporate your customer's words now and again later. But don't repeat inflammatory words such as "absurdly high costs" which may further reinforce a misperception
- Speak your customer's language
- Choose your own words selectively. Avoid phrases such as "You wouldn't be interested in..." or "I'm just calling about..." Instead, use persuasive, confident words
- Avoid the term 'product'
- Keep a positive attitude - remain helpful – even in adversity!

Checking

Checking lets you get feedback from your customer on what you are discussing - while you are discussing it. Checking means asking questions to gauge your customer's reactions as you go. It is a practical and accurate way to save you from reading the customer's mind. Checking questions are open ended - what, when, how, to what extent Here are some examples:

- How does that sound?
- What do you think of that?
- May I ask what concerns you have about ...?

Checking is not designed to get the customer to say 'yes', it is designed to get at what the customer thinks - 'yes' or 'no'.

SECTION C – WRITTEN COMMUNICATIONS

C-1 Letter Writing Checklist

ASK YOURSELF:

- 1 Does this letter present a good image of our organisation?
Does it look professional?
- 2 Does it look interesting and easy to read?
- 3 Does its purpose come over clearly?
4. Are all the facts there? Are they in the right order?
- 5 Does it say what you meant to say?
- 6 Is the tone right?
- 7 Is it clear who should do what, next?
- 8 Have you got copies for everyone who needs to know about this letter?
- 9 Line up the letter correctly and use the right salutary greeting with the right terminations ie:

Dear Sir(s)

Dear Mr xxxx

Dear Bob

Yours faithfully

Yours sincerely

Regards

If you can answer "YES" to all these questions, you can be confident of having written a good letter!

C-2 Business Writing - A B C

You have your facts, now you have to organise the content before beginning to write. Each point should develop your theme by following on logically from the previous one. Once the structure is clear, you can think about your style.

Style is not about *what* you say; it's about *how* you say it.

The best writing styles are based on three principles:

- the A B C of writing

ACCURACY
BREVITY
CLARITY

ACCURACY

- Say what you mean
- Use correct punctuation - it can change your meaning
- Check spelling - a few errors can damage your credibility
- Avoid ambiguity - use the right words in the right places and if in any doubt, check in the dictionary
- Be consistent in terminology
- Use only relevant information, anything else is only 'waffle'

BREVITY

- Use short, simple words
- Construct short, uncomplicated sentences, carefully chosen
- Use short paragraphs, changing whenever the topic changes
- Explain any technical terms which are not likely to be understood by your readers, but for the sake of brevity, this may be better in a glossary or appendix
- Don't assume a 'commercialised' writing style

CLARITY

- Start by making the topic and purpose clear
- Finish by reminding the reader of the key points and making it clear what happens next, particularly any action the reader must take
- Use headings and numbering styles consistently to avoid confusion
- Check that the progression is logical
- Check for ambiguity from the reader's point of view

WHAT WORDS TO USE

Accuracy, brevity and clarity will all be helped by choosing the right words to say exactly what you mean. Often in reports and business letters, the writer feels a need to try to impress the reader with long words and technical terms, but if all they do is confuse the reader, communication will not be effective. Here are some examples of unnecessarily elaborate words, with a simpler alternative:

Accommodation	<i>Room</i>	Evince	<i>Show</i>
Assist	<i>Help</i>	Endeavour	<i>Try</i>
Conceal	<i>Hide</i>	Inform	<i>Tell</i>
Consider	<i>Think</i>	Enquire	<i>Ask</i>
Desire	<i>Want</i>	Obtain	<i>Get</i>
Emoluments	<i>Pay</i>	Purchase	<i>Buy</i>
Despatch	<i>Send</i>	Peruse	<i>Read</i>

JARGON

Jargon is an essential tool for the Technical Specialist. However, you will alienate your readers if you use it without taking account of their ability or willingness to understand what you are saying.

If you need to use jargon, and you often will, attach a glossary that explains what you mean, and add diagrams if possible. These will save a great deal of time in explaining and understanding. If appropriate, use analogies to explain complicated ideas, relating the unknown to the known.

If you really know your subject, you should be able to explain it to people without the use of jargon. It is well worth the time and trouble to think it out so you can explain it to non-specialists.

If you need to refer frequently to VDUs explain them as Visual Display Units (VDUs) and use the abbreviation VDUs thereafter. (There is no apostrophe in VDUs; the apostrophe is reserved for the possessive, not the plural).

Remember, readers are at complete liberty to stop reading at any time!

C-3 *By email*

Technology aside, badly written emails can lose you business!

Ten steps to better emails

DO keep your subject header brief and meaningful for ease of reference (remember that normally only a limited number of characters show in the recipient's window)

DO double check that names of individuals, companies and official titles are spelled correctly

DO keep paragraphs down to a maximum of two sentences. If it's longer than 30 words it breaks up

DO be consistent. Do you write 'web' or 'Web' 'email' or 'e-mail'? Note your preferred version and stay with it

DO build up a library of sample email messages for frequent and specific tasks

DON'T get over friendly just because it's email. If the message is to a potential client, keep it as serious and sensible in tone as you would a letter

DON'T mimic the letter layout

DON'T send out an important message without getting someone to check it first

DON'T get carried away. Aim to restrict your message to one screen (longer texts are better sent as an attachment with a brief covering email)

DON'T presume that everyone is as IT-proficient as you are. Keep it simple!

C-4 *Proposals*

This section is divided into two sections. The first section is a best practice guide to the process of creating a successful and effective proposal document. The guide looks at five key stages in that process: establishing your project team, clarifying your client's needs, defining your message, delivering your message and then evaluating the outcome, both when you fail *and* when you succeed.

The focus in the second section is on language skills. Key topics include client focus, tone and style, grammar and punctuation, signposts, brevity and accuracy, clarity and impact.

Following these guidelines will:

- **Ensure** consistency in the design and delivery of all your proposals
- **Allow** for a flexible response to client needs
- **Minimise** the need to "re-invent the wheel" for every proposal
- **Make** most effective use of your time and resources
- **Enable** you to deliver high impact client centred proposals and presentations
- **Identify** roles, responsibility and ownership
- **Define** messages that are memorable, logically consistent and client focused.

Written Communications

There are four stages in the successful writing of a proposal:

- Stage 1** - **INVESTIGATION**
- Targeting the reader - the potential client. The purpose of the report must be clearly defined. Guided by the purpose, all necessary and relevant information is collected.
- Stage 2** - **PLANNING**
- Details, features and benefits are selected, dependent on the purpose and who is going to read it. This is then sorted into sections and given headings; material must be arranged in a logical progression.
- Stage 3** - **WRITING**
- The information, ideas, features and benefits are made clear and comprehensible.
- Stage 4** - **REVISION**
- Before issuing, a relentless check must be made of the entire document, for sense, clarity, completeness and accuracy.

C-5 *Proposal Best Practice Guide*

C-6 *Essentials for Written Proposals*

Many types of business will require you to prepare a written proposal that will be used as the basis for negotiations. In fact, the quality of your proposal may very well determine whether or not you even get to the negotiation stage. Therefore, it's worthwhile to consider a number of essential elements that can make your proposal a success.

1. Accuracy. Is your proposal error-free? Many proposals that are sound in all other respects fall by the wayside in this regard. This is usually due to limited time constraints when preparing the proposal. However, someone reading the proposal isn't thinking about the fact that it was prepared in a rush. Instead, they're probably wondering if someone this careless can deliver what they promise.
2. Be complete but concise. How much is enough is a mental hurdle that often leads to loading proposals with all sorts of irrelevant information. The question, "Is anything missing?" is always thought about during proposal preparation, but the counter question of, "Is this overkill?" is often ignored. Yet, sheer volume can spell the death knell for proposals far faster than a slim presentation that's loaded with convincing arguments.
3. Make it persuasive. Someone has to be convinced about something to make any proposal a winner. So support what you propose with sound reasoning, and if possible provide solid examples. In short, *prove* that you can produce what you are proposing.
4. Don't get fancy. Fight the tendency to offer more than is necessary to be successful. This can lead to promises that the reviewer knows cannot be fulfilled.
5. Skip the waffle! All too often, there's an attempt to cover-up an inadequacy by padding the proposal with issues that have no relationship to what's being proposed. For instance, a company that includes a description of all the work it's ever done – even if not relevant - creates scepticism. This leaves reviewers wondering if this is being done to beef-up an otherwise weak proposal.
6. Don't ignore problems. Many proposals accentuate the positive - which is good - but blithely ignore the negative aspects that must be overcome for the project to be a success. If you take the opportunity to recognise and discuss how problems will be resolved, you won't leave reviewers with the impression that you (1) don't understand the problems or (2) don't know how to deal with them. That's why it's important to anticipate questions, and provide the answers beforehand.

Written Communications

7. Solve the "right" problems. Many proposals try to succeed by covering "all of the bases" in any ballpark, when the game is just being played on one field. The proposal pitch sounds like, "Here's what we want to do, but if it isn't, we'll do what you want." This tactic seldom succeeds, since it shows a lack of conviction, as well as doubt about what is actually being proposed.
8. Be creative. Although you shouldn't wander too far afield, simply laying out a response that minimally complies with what's being sought won't get you very far. After all, most proposals will offer something similar, but the one that wins will have provided a little creativity in demonstrating how to build a better mousetrap.
9. Watch your numbers. As any insomniac knows, sleep has always been a welcome respite from the sheer monotony of numbers. But beyond boredom, deluging a reader with numbers can leave the subject matter mired in a numerical swamp. Long lists of numbers should be placed together in a separate section to provide both better organization and ease of analysis. And don't forget to spend some time thinking about how you will format your data. For example, if you're just indicating a general trend, a graph can be more effective than a lengthy list of numbers.
10. Combine substance with style. As any consumer goods manufacturer can tell you, packaging helps sell the product. Therefore, take pains to make your proposal look good. A proposal strong in substance may overcome the handicap of a sloppy appearance, but you run the risk of a reviewer who thinks that a shabby looking proposal may indicate lousy results down the road. So it's worth your while to prepare proposals that say, "The contents are just as good as the cover.
11. Remember readability. It's easy to overlook the potential readership of a proposal. This leads to proposals that are targeted toward one person or group, without considering the fact that the actual decision maker is someone else. This is especially true in technical proposals that are prepared on the assumption that only those who understand the technical terminology will evaluate the proposal. However, people who don't understand technical terms and the jargon of the trade often review proposals. Therefore, it's prudent to prepare proposals that avoid jargon, don't confuse readers, and that aren't vague. That's not to say that a proposal should be watered down to the level of overt simplicity. However, strive to make every proposal as readable as possible without sacrificing quality.
12. Don't waste your efforts. Preparing proposals is expensive, both in time and money. Therefore, try to concentrate your

Written Communications

resources on those proposals with the highest possible payoff. That way, you will be investing your energies in a "high yield" effort, rather than churning out proposals and gambling on a win.

Finally, personalise your proposal!

The very first sheet, before preface, before contents or whatever should be a simple statement to the effect that the proposal was written by *(names contact details and signatures)* as a result of meetings with *(client personnel)* and acknowledge thanks to them.

This creates a good impression before they even get to the meat of the proposal!

It is also good practise to include a Commercial Statement, qualifying the situation regarding:

- Confidentiality
- Copyright
- Errors and Omissions
- Subject to Contract
- Validity Period
- Trademark Acknowledgement
- Assumptions in the Proposal
- Implied Warranties in the wording of the Proposal
- Pricing exclusions

A brief synopsis of each is set out below:

Confidentiality:

Protection of the information provided to the client can be achieved by marking it confidential, usually done as a statement at the front of the document, as below, and on each page as a footer '*Commercial-in-Confidence*'.

Sample:

"The information contained within this proposal is confidential and is submitted to (client) on the understanding that it will only be used by the staff of (or consultants to (if applicable)) (client) for the purpose for which it is provided. The contents of this document may not be disclosed in whole or in part to any other party without the prior written consent of (your company)"

Copyright:

Anyone who creates a document that is capable of being represented in writing will own the copyright to prevent copying and unauthorised use by third parties. Copyright should be asserted on each page of a proposal by footer text '© {company name}.'

Errors and Omissions Statement:

Written Communications

This should be included in materially similar words to that below:
{Company} has made all reasonable endeavours to ensure that all statements contained in this document are accurate and cannot be held responsible for any errors or omissions.

Subject to Contract:

This phrase means that all terms and prices in a document, letter etc are not legally binding until a contract is agreed. It is important to use this term, as it is possible to construct a proposal such that it is in effect an unconditional offer. The danger in this is that a Client can accept the offer and by accepting it unconditionally, creates a legal contract on implied terms.

This should be included in materially similar words to that below:

Either:

This proposal is submitted to {client} subject to contract.

Or - where you are happy for a Client to accept the proposal:

This proposal is submitted to {client} on the basis that the resulting contract will be on {company} standard terms and conditions of contract.

Or - where the Client has included a sample set of their contract terms:

{Company} is happy to use {client}'s terms and conditions of contract as the basis for contract negotiations. {Company} agrees in principle to accept some of the terms but wishes to state that there are a number of provisions contained in the Request for Proposal that {company} finds inappropriate for a service of this nature. {Company} would welcome the opportunity to negotiate these provisions further in order that an equitable contract is achieved for the mutual benefit of both parties upon shortlist.

{Company} reserves the right to requote the contract price should any negotiation result in contract terms and conditions, which materially increase the cost or risk to {company}.

Validity Period:

A period of time for which the proposal is valid, usually a maximum of 90 days and often a shorter period.

This should be included in materially similar words to that below:

“This proposal is valid for 90 days from the date on this document. {Compaby} reserve the right to requote for this proposal on expiry of this period.”

Intellectual Property Rights:

Intellectual property rights are the intangible ownership rights that exist in works like software, documents, but also include design rights (the shape of the coca-cola bottle is a good example), patents and trademarks. Clients often seek to own these, so it is frequently worthwhile asserting ones ownership rights in a proposal.

Such an assertion is not appropriate for the business of most organisations.

This should be included in materially similar words to that below:

“Intellectual Property Rights resulting from work by {company} pursuant to this proposal will be vested in {company}, unless agreed in writing otherwise.”

Trademark Acknowledgement:

Trademarks are marks used by companies to brand their products and services, eg trademarks such as: Kellogg’s, Cellnet, Coca-Cola etc. Use of these marks requires acknowledgement of the owner’s rights by using the ® or ™ symbols. To avoid having to do this all the way through a document, an acknowledgement statement can be used to notify all readers that you acknowledge that the trademark belongs to a third party, and thus shows a level of commercial acumen.

This should be included in materially similar words to that below:

“Where {company} has referenced a third party's trademark in this document, {company} acknowledges the third party's rights thereto.”

Assumptions in the Proposal

A major source of Client dissatisfaction towards the end of any sale can be when an assumption underlying a proposal is found to be flawed and a change in timescale, resources, pricing etc. is necessitated, prior to agreeing a contract. To avoid this undesirable outcome, the bid team needs to focus carefully on documenting assumptions used in creating a proposal, so that changes in a Client’s requirements, between proposal and contract, resulting in pricing, time scale changes etc, are clearly documented.

Areas that can cause Client dissatisfaction when changed late in the sales cycle, amongst others, are changes in:

- Pricing
- Technology platform - minimum specification
- Timescales
- Start & end dates for a project or milestones in a project
- Resource utilisation (numbers of people required)
- Client obligations

Implied Warranties in Wording of Proposals:

Written Communications

Any proposal is a 'representation to contract' and as such is legally viewed as an inducement to enter a contract. If a representation is later found to be untrue or exaggerated it could cause you or your company legal problems and could result in paying the Client damages. From a client satisfaction perspective representations to contract are important in setting expectations of a service.

There are many words or phrases that can be used in a proposal, from which a Client may infer expectations of a service's performance or the warranties (the legal word for guarantees) which {company} would enter into at the contract stage. Frequently, the Client expectations raised by these words or phrases are far beyond what is possible to commit to with any degree of certainty, or are things over which {company} will have little control in the contract.

Examples of such phrases should *not* be included in proposals.

{Company} guarantees that.....
24-hour continuous guarantee

Pricing Exclusions:

For contracts undertaken within the UK, it is normal practice to make pricing exclusive of VAT and expenses, however, once a contract is with a party overseas then many other costs and taxes arise and these need to be considered in the pricing or excluded in the Commercial Statement.

For the UK.

"All prices are exclusive of VAT and agreed expenses"

For delivery in other Countries:

"All prices are quoted in UK Sterling and are exclusive of VAT, duties, withholding taxes, levies and imposts of any kind (excepting taxes on {company's business profits), delivery costs and travel and subsistence expenses."

:

Written Communications
THE FIVE-STEP PROPOSAL PROCESS

ESTABLISH THE TEAM

CLARIFY THE CLIENT NEED

DEFINE THE MESSAGE

DELIVER THE MESSAGE

EVALUATE THE OUTCOME

The process is not a straitjacket. It does not set down a series of minutely defined steps, which, at all times and in all proposals, must be observed.

Nor is the process a prescriptive list of solutions. Rather, it is a guide to asking the right questions. Those involved in the proposal are responsible for providing answers appropriate to the culture, expectations and business needs of the individual client.

THE FIVE-STEP PROCESS

STEP ONE

ESTABLISH THE TEAM

The project leader
Choosing the team
Selling a clear objective
Roles and responsibilities
Project timetable
Admin support

STEP TWO

CLARIFY THE CLIENT NEED

Types of research needed
The client meeting
The client and the competition
Areas of concern

STEP THREE

DEFINE THE MESSAGE

The message
A client centred argument to support the message
Structuring the argument
Parallel logic
Logic checklist

STEP FOUR

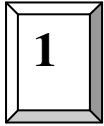
DELIVER THE MESSAGE

Structure
Design and appearance
Presentation
Follow up

STEP FIVE

EVALUATE THE OUTCOME

Internal de-brief
Client feedback



**STEP ONE:
ESTABLISH THE TEAM**

The Leader

In each proposal, the leader is responsible for successfully exploiting the business opportunity. Every leader works in a different way. However, whatever your management style and whatever techniques you use to achieve success, you will need detailed and specific answers to some basic questions. For example, how will you:

- Provide strong and effective leadership?
- Motivate and encourage team members?
- Recognise the value of their contributions?
- Ensure high standards (for example, in client focus and the meeting of deadlines) are clearly laid down and consistently adhered to?
- Create a positive atmosphere in which enthusiasm and teamwork can flourish?

Choosing the Team

The project leader sets appropriate criteria for the selection of team members.

For example:

- How much relevant knowledge is there in the team?
- Do the personalities of team members match the client?
- What credentials do team members have in this type of business project? What is their level of expertise?
- Is the balance of skills right? Do we have enough people?
- Do team members have any previous personal contacts with the client? Are there any relationships we can exploit?

Setting a Clear Objective

The project must have clearly defined objectives. For example:

- What is at stake for us in this project?
- What is the value of the potential business?

Written Communications

- What is the lifetime value of this client?
- What would be the effect of losing it?
- What is the potential for further business beyond this pitch?
- What specifically are we trying to achieve in each client meeting, contact, document or presentation?

Roles and Responsibilities

Every team member must have a *clear* understanding of their role in the project and of what they are responsible for delivering. Clarity in this context means:

- Is the work done by a junior member of the team (research, number crunching, etc) performed simply to prove to the project leader that a lot of work has to be done? Or is it focused on client needs?
- What is the purpose of each task performed? How does this particular research help the team achieve its objective?
- In what ways does each team member add real value to the project?

Project Timetable

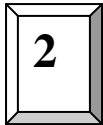
A timetable for each stage of the project needs to be set down and agreed. This timetable may well change under pressure of unexpected events, of new business coming in and of other demands on team members' time. However, clear milestones for the project must be identified. For example, has the team set deadlines for:

- Completion of research?
- Delivery of first draft of the proposal document?
- Project leader and team evaluation of the first draft?
- Delivery of final draft?
- Design and production of visual aids?
- Rehearsal of presentation?

Admin Support

Ensuring the early involvement of the people who will provide the project with its administrative support brings real benefits. How will the project leader and individual team members:

- Make secretaries feel genuinely part of the team?
- Motivate them to work harder and possibly for longer hours?
- Ensure secretaries are given a big picture briefing of the business background to the project so that their work is more focused and effective?
- Communicate clearly with secretaries so that they know exactly what you want from them *and* you know what they need from you?
- Provide frequent, timely and thorough briefings for all support staff?
- Ensure that there is a sufficient supply of materials in stock?
- Ensure that the quality of all outputs (Visuals, documents, letters etc) produced by support is of the highest quality?
- Involve secretaries at the earliest appropriate moment so that they do not feel "dumped on" at the last moment?



**STEP TWO:
CLARIFY CLIENT NEEDS**

Types of Research needed

Thorough, well-planned research enables you to meet your client's needs. Has the project team explored all appropriate areas of research? For example research into:

- The client's recent history.
- The client's products or services, areas of operation, recent results, business strategy and organisational goals. Sources here include press comment, and information gained from directors, auditors, banks, accountants and other advisors.
- Industry information - the environment in which the client operates and the problems currently being faced by similar organisations.
- The decision makers. Who holds the power? What is their background? Their career histories? What will happen to their careers if this project is a success? What will happen if it is a failure?
- Influencers. Who has the power to influence the decision? How can they be reached?
- Your contacts with the client. Your own database of information. Your internal network of contacts. Any "inside" knowledge individuals outside the project team may have of the client at a formal or informal level.
- Areas of resistance. Why *wouldn't* the client accept your recommendations? What will our recommendations look, sound and feel like *from the client side of the table*?
- Value Drivers. What are the key value drivers for the client? What are the priorities? On what criteria will the client be judging your proposal?
- Culture. What is the culture of the client's organisation? Autocratic? Buccaneering? Consensus building? Traditional? Cautious? Family owned? Public sector?

The Client Meeting

The client meeting is a golden opportunity to increase your chances of success. In what *specific and tangible* ways will you seize your

W r i t t e n C o m m u n i c a t i o n s

chance to:

- Strengthen initial impressions already made?
- Give evidence of your understanding and knowledge?
- Demonstrate your willingness to provide excellent service?
- Achieve a detailed understanding of client needs?
- Build rapport and begin to create a relationship of trust and mutual respect?
- Identify and cultivate decision makers and influencers?
- Add value by looking beyond the brief and offering fresh insight and ideas?
- Plan the meeting in terms of agenda and objectives? Decide on roles and responsibilities of your team – who takes the notes, who summarises client concerns at the end of the meeting, who handles what questions and who chairs the debate?

The Client and the Competition

Awareness of who your competitors are and what they offer to the client is essential. You need to know your own strengths and weaknesses **and** those of your competitors. For example:

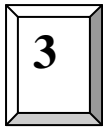
- Which supplier has the client used in the past?
- Is the client satisfied with the service provided by his existing supplier?
- What concrete reasons can you give to overcome client inertia and make him change supplier?
- What specific benefits, (in terms of service, experience, knowledge, resources, people etc) do you offer that the competition does not?
- What perceptions does the client have of your organisation?
- If those perceptions are negative, how can you counter them?
- What promises is the competition likely to make to the client? For example, lower price or quicker delivery?

Areas of Concern

You need to precisely identify particular areas of client concern. What concerns are uppermost in the client's mind? Is it?

- Price?
- Quality?
- Delivery times?
- Meeting budgets and timescales?

These concerns will, of course, play a vital role in the next stage of the process - defining the message you give the client.



**STEP THREE:
DEFINE THE CORE MESSAGE**

The Message

It is important to draw a clear distinction between your objective and your message.

Your objective is, of course, to win new business for your organisation. It relates to you and to your concerns.

Your message, on the other hand, must be about the client and his concerns. It must be client centred.

To make sure there is an exact fit between your message and the client's needs, you must put yourself in the client's shoes. You need to imagine what is the most important question in the client's mind - the one central question that has led him to consider taking action. For example:

How can I increase shareholder value?

Your core message must provide the answer to this basic question. For example:

By divesting companies A and B you will increase shareholder value.

This message is your core recommendation. It is your main point. Without total clarity on the message, your pitch or proposal will not succeed. Only when total clarity has been achieved is it possible to construct an effective argument. An argument that provides rock solid support for your main message.

A Client Centred Argument to Support the Message

Like your message, your argument must be client centred. To do that you need to establish the criteria the client will use to judge your proposal. Those criteria spring directly from the particular concerns you have identified in the previous stage - *Clarify the client need.*

Each concern leads directly to one of the criteria the client will use to judge your proposal.

If, for example, the concern is investor sentiment, one of the criteria for judging your proposal is that it must be attractive to investors.

If, for example, the concern is with the client's balance sheet, one of the criteria for judging your proposal will be that it will not have a

W r i t t e n C o m m u n i c a t i o n s

negative effect on equity.

So, you now have a clear message. That message is your main point, the core recommendation you are making to your client.

You have also identified the different criteria by which the client will judge your proposal. Criteria that spring directly from the client's major concerns. It is important to rank those criteria in order of importance.

It is now time to structure the argument you will use in support of your core recommendation.

Structuring the Argument

To create the basic structure:

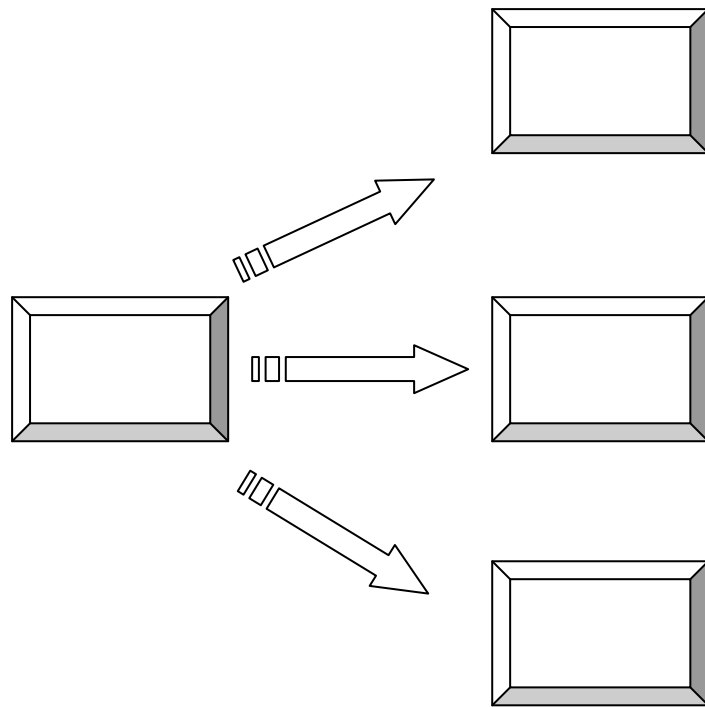
Write the main point of the argument to the left on a sheet of paper. The main point is the core message. The one action we want the client to take or the one concept you want them to remember.

Write the support or "branches" to the right of the main point. The branches must all answer the same question. They must all be reasons, steps or parts of a whole.

Check that each statement is a complete thought.

On the next page is a diagram showing the basic structure.

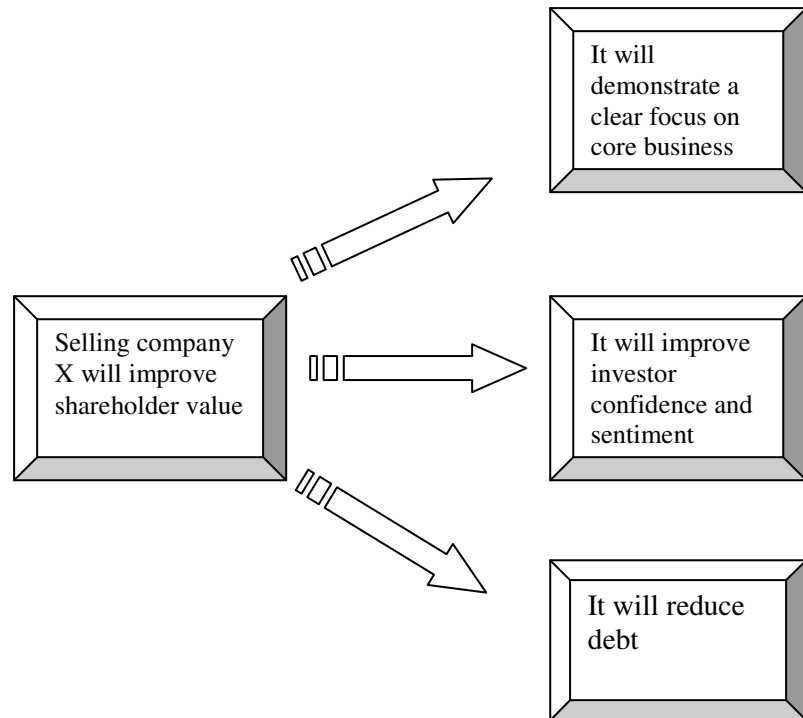
Written Communications
Create the Basic Structure...



**Central or Main Point
Trunk**

**Supporting
Branches**

Written Communications
Use Parallel Logic.....



**Central or Main Point
Trunk**

**Supporting
Branches**

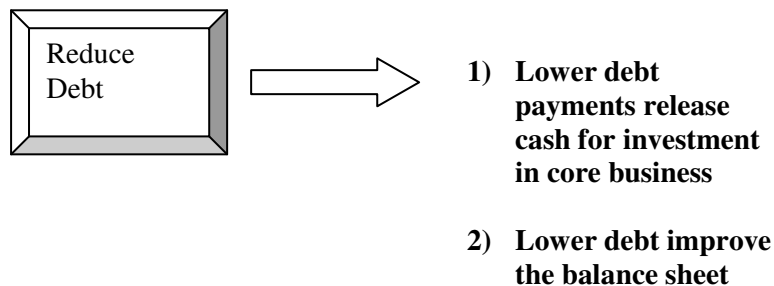
Parallel Logic

Use parallel logic to support the argument. It is much easier for the client to follow.

Parallel logic is safer and more reliable than chained logic

- Parallel: all branches are independent of each other. If one branch is invalidated, the remaining branches can be used to support the main point.
- Chained: the branches are interdependent. If one link in the chain is broken or invalidated you cannot reach your main point.

To the right of each branch write the supporting points that provide evidence or further detail. This creates additional support for and clarification of the argument. For example, in support of the branch of the argument dealing with reduced debt, the supporting points might be:



Logic Checklist

It's important to rigorously test the logic of the arguments we present to our clients. The following questions provide a simple checklist:

- Is the main point the one message you want the client to remember? The main point will usually be the recommendation or major conclusion.
- Do the branches of the argument all relate to the main point in the same way?
- Do the supporting points all relate to the branches in the same way?
- Do your branches, to extend the metaphor, have twigs? In other words have you got supporting points for each branch of your argument?

Written Communications

- Are all the statements in the argument written as full thoughts?
Do they all contain a verb?

When you are absolutely sure the logic of your argument is rock solid it is time to move on to the next step of the process - delivering the message.

4

Written Communications

STEP FOUR: DELIVER THE MESSAGE

The proposal document is the medium you use to deliver your message. It is also the single most important piece of evidence you put in front of the client. It is evidence of your thinking, your creativity, your attention to detail and your passion for excellence. It is evidence of how your organisation listens and responds to client needs. It is evidence of the quality of service and the level of skill the client can expect from you if you are entrusted with the project.

You must therefore have answers to the following questions:

- Have you begun the proposal by stating your main point (as identified in Step Three - Define the Message)?
- In the opening section, have you told the client what he wants to know? Have you addressed the client's main concern and shown that you understand the criteria by which your proposal will be judged?
- Have you built a rapport with the client by visioning success from his point of view - ie clearly identifying the benefits that will flow from taking your advice?
- Have you avoided telling the client what he already knows, for example, three pages of minute detail on the structure of his or her organisation?
- Have you stated your argument with total clarity, giving the client clear signposts so that, at any point in the book, he knows what he is reading and why he is reading it.
- Does the information you have included support and enhance your advice and analysis? Have you muddied the waters by including more detail or clarified them by focusing on essentials? (less is more!)
- Have you added value by offering more than a neat collation of data?
- Is the balance between stating problems and providing solutions correct?
- Have you given sufficient prominence to your solutions, advice and recommendations - which are, after all, what the client is paying for?
- Have you provided your readers with access to your argument at different levels of detail - executive summary, key point boxes, appendices?

Structure

A clear structure is essential. Have you achieved a clear, client driven structure for your proposal document? Arranging the information in the order suggested below will give your document clarity and impact.

- **Build** rapport, state the main point of our argument, hook the client in with a clear statement of the benefits.
- **Summarise** the argument at headline level.
- **Address** the most important branch of your argument and related supporting points.
- **Continue** with each branch and related supporting points, in order of importance, until you have discussed every aspect of your argument.
- **List** the project team and its credentials, specifically tailored to suit the client's needs.
- **Conclude** with a brief summary of your main point, the branches that support it and a clear re-statement of the benefits for the client.
- **Use** appendices to provide a deeper level of detail and to present more fully the number crunching and research you did in order to develop and support your argument.

Design and Appearance

Good layout and design helps to make your message accessible to your client. Make life easy for your client and you will win his gratitude and his trust. Here are some questions to consider:

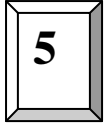
- Some clients will read every page of your document. Many will not. What opportunities have you provided for the client who wants a brief overview? An executive summary? Key point boxes on each page? An introduction page to each section giving a bullet point summary of the topics covered?
- How many visuals do you put on each page? A single, high impact image, centred on the page, highlighted by the white space around it? Or a complex clutter of visual information?
- Do you always make the link between text and visuals absolutely clear?
- Do you use the same palette of colours for all your bar charts, pie

W r i t t e n C o m m u n i c a t i o n s

charts and graphs? If you do, the client will soon recognise and become comfortable with the conventions you establish.

- How consistent is your format? Does each page conform to the same standards? Are bullets always in the same font? Does your logo always appear in the same way?
- Try picking up one of your documents and judging it purely on its physical appearance. What impression does it make? What weight is the paper? How stiff is the backing card? Is the plastic binder frigid or floppy?
- Are you proud of your documents? Are they a worthy ambassador for your organisation?

Missed deadlines, typing errors, not returning calls cause more contracts to be lost than high pricing or huge mistakes!



**STEP FIVE:
EVALUATE THE OUTCOME**

Follow Up

Proposals can be won or lost on the quality of your follow up. Have you:

- Responded to any client requests for further information or clarification?
- Written a letter of response on the day of the pitch thanking the client for the opportunity to present?
- Clarified when you can expect a response?

EVALUATION

The evaluation loop is essential. An organisation that fails to learn from its own history is doomed to repeat the mistakes of the past.

Failure is expensive. Learning from failure allows you to recover some of the investment you have made. In a similar way, the lessons of success need to be clearly identified, captured and used to help you win success again and again. The following questions will assist to evaluate the outcome of your proposals:

- Do you hold an informal "first impressions" de-brief? This helps you to capture the experience when it is fresh in your minds.
- Do you, within three days of the pitch, hold a structured de-brief in which you measure your performance in the pitch against an agreed list of criteria?
- Have you made clear who is responsible for building the lessons you have learnt into your best practice guide?
- What mechanism do you have in place for finding out what your client thought and felt about your pitch?
- How do you spread the learning you have gained from your client's comments and your own self-analysis to the people who need to share it?

C-7 *The Language of Pitching*

SYNOPSIS

Good English is rare today – and it shows! The following topics cover mistakes that are common throughout industry but can easily be remedied with a little knowledge!

- THE GOLDEN RULES
- GREAT WORDS, WRONG SUBJECT
- PLAIN ENGLISH
- BREVITY
- THE TLA - A PRIVATE CODE
- ABBREVIATIONS
- MONEY & NUMBERS
- WEIGHTS, MEASURES, DATES AND PERCENTAGES
- PLACE NAMES
- TYPOS
- FORMAL ADDRESS
- THE INTRUSIVE CAPITAL
- UPPERCASE TRADE NAMES
- SINGULAR & PLURAL
- PUNCTUATION
- APOSTROPHES
- COMMAS
- QUOTATION MARKS
- LEAVE IT OUT - THE WORDS WE SEE TOO MUCH OF

THE GOLDEN RULES

BE SHORT

BE SIMPLE

BE HUMAN

*The golden rules as laid down by Sir Ernest Gowers in a guide to
civil servants.*

GREAT WORDS, WRONG SUBJECT

"It was extraordinary. We talked about our past experience, our other clients, and our background. We talked about our biographies, which I have to say, are *very* impressive. We talked about our new HQ building, our IT, our latest promotional campaign - everything. They wouldn't let us finish. All they wanted to talk about was getting passengers onto their trains."

Comment made by the Managing Director of a company, one of the four proposing to manage a customer loyalty programme for a potential client - they failed to win the account.

PLAIN ENGLISH

Imagine your reader sitting across the desk in front of you. Use the kind of language you would use if you were having a conversation between intelligent people. Don't put on linguistic "airs and graces."

In fact, ***be short, be simple, be human***. Do it because you respect your reader and because you want him or her to understand you clearly. Do it because, of course, you do not want to be guilty of horrors like these:

"Following due consideration and a systematic evaluation of the audited results of the communications survey conducted on an estate-wide basis a consensus was reached that the communications needs of residents would be most effectively met by the production of a print-format forum for the exchange of views and the dissemination of relevant information."

Local authority housing officer reporting back to tenants on an East London housing estate.

"The medium term strategic objective is to empower customer facing support operatives to re-proceduralise their process goals in a value drive, mission oriented macro environment, whilst retaining an autonomous ability to configure and sequentialise personal priorities in full alignment with organisational deliverables."

Written Communications

Human resources consultant pitching to win an organisational development project.

"...the growing importance of international co-operation and new theories of economics sovereignty aims a wide range of areas : macro-economics, trade, the environment, the growth of post neo-classical endogenous growth theory and the symbiotic relationships between growth and investment in people and infrastructure..."

Gordon Brown, as Shadow Chancellor. (Awarded gobbledygook gold medal by the Plain English campaigns 1994.)

"If a right to acquire shares in a body corporate is assigned or released in whole or in part for a consideration which consists of or comprises another right to assign shares in that or any other body corporate, that right shall not be treated as consideration for the assignment or release, but this section shall apply in relation to it as it applies in relation to the right assigned or released and as if the consideration for its acquisition did not include the value of the right assigned or released but did include the amount or value of the consideration given for the grant of the right assigned or released so far as that has not been offset by any valuable consideration for the assignment or release other than the consideration consisting of the other right".

Section 5 (3) Finance Act 1966.

BREVITY

Inspiration

The battle of Gettysburg was the decisive battle of the American Civil War. After the defeat of the Confederate forces, two speeches were made. The first, by Senator Edward Everett, took two hours to deliver. It contains 1,500 sentences. The second speech was by Abraham Lincoln. The Gettysburg Address took just over two minutes to deliver. It contains ten sentences. Two thirds of the 268 words used by Lincoln are words of one syllable.

Which speech got remembered?

Bureaucracy

Written Communications

The Lord's Prayer contains 56 words. The Declaration of Independence 300. An EU directive setting the price of cabbage contained 26,911!

THE TLA - A PRIVATE CODE

Few trades, professions or businesses are free from the curse of the TLA. Or, to give it its proper title, the three letter acronym.

The community of people who can, without conscious thought, translate the staccato rattle of the TLA into meaning are like residents of a village. Within the boundaries of the village each trio of letters is part of a private code, a convenient shorthand for insiders. Information technology has, of course, created a whole dictionary of bafflement. Does the following leap off the page for you?

“The simple solution to the problem is a heterogeneous APPC/PC connection implemented over a TCP/IP token ring. This client / server approach, utilising a GUI (OSF or OS/2) front end allows an OOP UB – independent schedule RAD environment. “

For those outside the village, the code is impenetrable, irritating and alienating. Try translating the following code from the Metropolitan Police - there is a translation at the bottom of the page.

The DCI wants CID to get the 609 from CR0. The CPS want the TDAs to be TIC'd.

Translation: The Detective Chief Inspector wants the Criminal Investigation Department to get form number 609 from the Criminal Records Office. The Crown Prosecution Service wants the Taking and Driving Away offences to be taken into consideration.

ABBREVIATIONS

When abbreviations are used they should be spelt out first time, usually with the abbreviation in brackets. Again, avoid unnecessary repetition. Too many capital letters make any page hard to read.

Beware, too, the evolving body, such as *the EU* formerly *the EC* before that *the EEC* and originally *the Common Market*.

There are a handful of cases where initials do not need to be spelled out. Some obvious examples are *BBQ FBI*, *MP*, *MCC*, *RAF*, *VC*, *UK* and *US*. More recent additions to the list, such as *JVC*, *BMW*, *CNN* and *plc*, should not be spelt out if the result would be incomprehensible, confusing or less familiar than the original abbreviation. They might, however, need tagging with a phrase to explain them.

Avoid full stops in abbreviations (*even ie, eg and etc*). Write *BBC*, not *B.B. C.*, *IBM* not *I.B.M*, and *CBI*, not *C. B.I*. Some sets of initials or contractions of complex titles have become words in their own right. Be grateful. Use these acronyms and contractions - *Oftel*, *Intelsat*, *Nato*, *Unesco* and so on - to avoid pages sprinkled with clusters of capitals.

Leave out the full stops in abbreviations such as *mph*, *kph*, *mpg* and *rpm*. They should also be omitted in other lower-case abbreviations, once they have been spelt out on first mention, eg *cubic centimetres* becomes *cc*.

MONEY AND NUMBERS

- The £ sign and p are not used together. Write *£1.75*. Below *£1* use pence - *75p*, not *£0.75*. But for non-sterling money always show the amount in the main currency unit, eg *\$0 75* or *€0.50*, not *75 cents* or *50 centimes*. Remember that like sheep, the plural of Euro is Euro – NOT Euros!
- Numbers from one to ten inclusive should be spelt out. Those from 11 upwards should be written as figures.
- Numbers next to other numbers should be spelt out - *nineteen 25-franc notes* (not *19 25-franc notes*).
- Tabulated numbers are always in figure form - *£8, 9am, 2mph*. Note there is no gap between the 9 and the *am*.
- Numbers should not begin a sentence. If this is unavoidable, they must be spelt out - *Fifty drivers* won safety awards.
- First, second, third and so on are also spelt out.
- Always use round numbers with the word *about*. To write *about 703* looks - and is - ridiculous. Round it off to say *about 700*.
- Generally, *over* and *under* should not be used with numbers. Say *more than* and *fewer than*, except for measurements (*less than 200 miles* is correct, as is *less than three gallons*) and ages - *people under 19*.
- If you are writing a number below one, put in the initial zero - *0.3*, not *.3*. Steer clear of fractions in numerical form. They often do not print well in small type.
- *Million* should be written out in cases such as *five million Scots can't be wrong*. American and British *billions* are now the same - 1,000,000,000.

Written Communications
WEIGHTS, MEASURES, DATES AND PERCENTAGES

- Use the following abbreviations for British weights and measures:
 - *cwt, st, lb, oz* never *lbs* and *ozs*
 - *hr, mm, sec*
 - *yd, ft, in*
 - *gal, qt, pt*
- These join directly onto the number with no space left between: eg *20cwt*, not *20 cwt*.
- In the metric system the recognised abbreviations are:
 - *m, metre, km, kilometre; g, gram, kg, kilogram; l litre.*
- For dates, develop a consistent style. For example, *28 February 1995* (no *the* and no comma).
- In grouped dates, style is *1939-45* (not *1939-1945*). If two dates in the same decade are grouped, repeat the third number - *1994-97* (not *1994-7*). The financial year is written *1994/95*.
- *Per cent* is spelt out, not abbreviated to *%* (except in headings). The difference between *percentages* and *percentage points* can be crucial. Do not get it wrong. If the mortgage rate goes up from 7 per cent to 14 per cent, it has risen by *7 percentage points*. But it has actually gone up *100 per cent*. The cost of home loans doubles. People have to pay twice as much every month and dismay and destitution will be the order of the day.

PLACE NAMES

The *United Kingdom* (UK is OK) is England, Scotland, Wales and Northern Ireland. Strictly, it does not include the Channel Islands and the Isle of Man.

Great Britain is England, Scotland and Wales; it is a geographical unit rather than a political one.

The British Isles consists of Great Britain plus the whole of Ireland, north and south and the other islands. Again, a geographical grouping only.

Ulster strictly includes nine counties, only six of them in Northern Ireland. It is often used as a way of referring to *Northern Ireland*. In Ireland (though it's a republic, *Republic of Ireland* is wrong), it can raise objections, so avoid.

Spellings of place names should be checked in a reliable gazetteer, such as the *Times Concise Atlas of the World*, or the *Bartholomew Gazetteer of Britain*.

There are some well-known difficulties, such as *Newcastle upon Tyne* (with *upon* and no hyphens), *Middlesbrough* (no *o* between the *b* and *r*) and *Edinburgh*, and *John O 'Groats* (even though the name derives from John O'Groat).

It is *Land's End* (apostrophe), but *Bury St Edmunds*, *St Helens*, *St Albans* and *Earls Court* (no apostrophes); *Stratford-on-Avon* (*on* plus hyphens), *Kingston-upon-Thames* (*upon* plus hyphens), *Barrow-in-Furness* (*in* and hyphens), *Moreton-in-Marsh* (no *the*), *Weston-super-Mare* (lower case *s* on *super*, and hyphens).

Teesside has a *double e* followed by a *double s* and the Straits of Dover aren't - it's the *Strait of Dover*.

Counties sometimes acquire the suffix *-shire* with no justification. Apart from the obvious shireless counties (such as *Essex*), *Devon*, *Dorset* and *Somerset* all manage without. In Northern Ireland, no county takes *shire* and each has the prefix *Co* - as does *Co Durham* in England.

The *Lake District* has only one stretch of water with the prefix *lake* - *Lake Bassenthwaite*.

TYPOS

The trouble with typos is that they force you to take your eye off the ball. It is very hard to concentrate if the eye, and therefore the brain, is constantly being distracted.

*Worse, they can fatally undermine the impact of your message. Study the following extract carefully. It is taken from *One Hundred Firsts*, a beautifully produced glossy book published to celebrate the centenary of *The Savoy Hotel*.*

Sadly, the diary editors of the broadsheet newspapers picked up on one typo. Instead of positive coverage of a glamorous celebration, much of the publicity focused on one amusing mistake. The impact of the book as a marketing tool was thus greatly reduced. See if you can spot the typo.

“In 1967, Lady Whitmore, the Swedish-born wife of British racing driver Sir John Whitmore, became the first woman to die in the the Savoy restaurant wearing trousers.”

FORMAL ADDRESS?

ELIZABETH THE SECOND by the Grace of God of the United Kingdom of Great Britain and Northern Ireland and of Our other Realms and Territories Queen, Head of the Commonwealth, Defender of the Faith.

NOW THEREFORE know Ye that We, by virtue of Our Prerogative Royal and any of all other powers enabling Us so to do, have of Our especial grace, certain knowledge and mere motion granted and declared and do by these Presents for Us, Our Heirs and Successors, grant and declare as follows

Extract from Letters Patent issued by Her Majesty The Queen

It is different if you are The Queen. Normal rules do not apply. And, to be fair, if a Queen can't indulge herself in a little formality, who can? For the rest of us, a little less majesty and a little more ordinary speech will achieve better results.

Even if we are not in "monarchy mode" we can still be tempted to a wooden and unnatural formality. Have you ever come across the following?

Be assured of our very best intentions

With reference to your communication of the 14th inst

Patrons are requested to refrain from smoking

THE INTRUSIVE CAPITAL

The bureaucrat's instinct to award deferential capital letters to words like department, division, committee and company should be shunned. Capitals should never creep in without a good reason. Use them for:

- Proper names - the real names of people, places products, firms, ships, institutions and so on;
- Organisations and bodies, as part of a specific name - *Devon County Council, Lee Valley Regional Park Authority, the Department for Education*. If the full title is not used, drop down to lower case - *the council, the authority, the department*;
- Places, including ill-defined but recognisable geographical areas,

W r i t t e n C o m m u n i c a t i o n s

such as *the West End, the Midlands, the West Country, the South Coast, the Far East, the Continent and the Pacific Rim*;

- Ordinary words used in extraordinary ways as part of a title - *the Act, the Bill, the Bar and the Bench. The*, itself, on the rare occasions when it is formally part of a title - as in *The Times, The Economist, The Hague*;
- Titles of books, films and plays. Each important word in the title should be given a capital - *The Hitch-Hiker 's Guide to the Galaxy, A Brief History of Time, Hart's Rules for Compositors and Readers, Le Rouge et le Noir, Dances with Wolves* -and the title should be in italics, where the typeface chosen makes it possible. If not, bold type or underlining should be used;
- Political parties, historical events and *periods (Peasants Revolt, the Depression, Project Sovereign)*, religions, nationalities and races, "-isms" formed from proper *names (Marxism, Thatcherism, Balkanisation)* and major events (*Cup Final, Test match, US Open, Innovation 94*).

UPPER CASE TRADE NAMES

Trade names always take capitals and should therefore be avoided if possible. Here is a checklist of some of the more common - and most jealously guarded - trade names:

<i>Barbour</i>	<i>Gore-Tex</i>	<i>Tarmac</i>
<i>BiC</i>	<i>Hoover</i>	<i>Teflon</i>
<i>Biro</i>	<i>Jeep</i>	<i>Technicolor</i>
<i>Calor Gas</i>	<i>Land Rover</i>	<i>Thermos</i>
<i>Catseye</i>	<i>Nescafe'</i>	<i>Tipp-Ex</i>
<i>Cellophane</i>	<i>Plasticine</i>	<i>Unix</i>
<i>Coca-Cola (Coke)</i>	<i>Polaroid</i>	<i>Valium</i>
<i>Elastoplast</i>	<i>Post-it</i>	<i>Vaseline</i>
<i>Fibreglass</i>	<i>Rolls-Royce</i>	<i>Walkman</i>
<i>Filofax</i>	<i>Sellotape</i>	<i>Windows</i>

SINGULAR AND PLURAL

Collective nouns are singular. The correct usage eg is “The Government is....” Not “ The Government are....”, Similarly with departments, divisions, regions, committees and councils.

There can be exceptions - police, for example, *are hunting* for vandals. *A number of security guards are*, too. But we don't want *the company are* or *the crowd are getting restless*.

Bear in mind that *none* and *no-one* are both singular - 200 people were involved, *but none was hurt*.

PUNCTUATION

In general, people are either confident of their ability to punctuate their sentences or perplexed by the ins and outs of what can be a very difficult subject.

Those who feel they know what they're doing need no help from me. But others may find this minimalist's guide to dots and dashes unusual and helpful.

Stripped down to some very basic rules of thumb, punctuating your sentences need only involve seven marks; colon, full stop, question mark, dash, apostrophe, comma and quotation marks. These are the guidelines you need to remember.

1. Forget semicolons. Forget exclamation marks. Forget colons, except to introduce a quotation or a list of bullet points.
2. Use full stops more than you expect to. It is a very rare mistake for someone to use a full point where it cannot be right (other than in abbreviations, where we just leave them out). When in doubt, your instinct should always be to plump for a full stop.
3. Use a question mark every time there is a genuine direct question. That means *Are you going?* but not *I asked if he was going?* (wrong, because it is only a report of a question).
4. Use dashes, but don't overdo them. They are particularly useful because they are modern and the rules surrounding their use are hazy. You can have pairs of dashes - in place of brackets - or a single dash to mark a break in the sentence before a punch line or throwaway remark: *In life, two things are never with us - death and taxes.*

That's cleared the decks. But the other marks, apostrophe, comma and quote marks, need to be discussed in more detail.

APOSTROPHES

Apostrophes cause no end of bother, including the most notorious error of all ... the greengrocer's plural.

Tomatoe's, beet's and cabbage's may be good for a cheap laugh, but *PC's* and even *customer's* are not unknown. There should be no confusion; apostrophes do not make things plural - and that includes *Boeing 747s* *size 9s*, the *1990s*, *MPs*, *HQs* and *PCs*.

The general rule is: if something belongs to *someone*, you write *someone's* or, for example, *the manager's* (apostrophe *s*).

If it belongs to several people (*the managers*) and the plural form is made by adding an 's', you write *the managers'* (plural form of *manager*, followed by an apostrophe - no extra *s*). Plurals like *people* and *children*, that aren't made with *s*, take apostrophe *s*.

Apostrophes also show where letters are missed out - *can't pay*, *won't pay*. These short forms of familiar words are now accepted in all but the most formal writing.

It's is short for *it is* or *it has* (*it's been a cold day*). Beware of *its* (meaning of *it*), *yours*, *hers*, *ours*, *theirs* and *whose*. None of them takes an apostrophe.

Be careful about another apostrophe that is often mislaid, the one in *30 days' credit* and *two years' work*.

COMMAS

Commas confuse more people, including professional writers, than any other punctuation mark. The rule of thumb is simple: when in doubt, leave it out.

Most mistakes with commas involve dropping one solo comma into a sentence where it's not needed or there should be two. Commas, like buses, often come along in pairs. It is wrong to write *The reason is as it always was, to save money*. Two commas should be used, like brackets, either side of the phrase *as it always was*.

Similarly, it may be just about acceptable to start a sentence *Chairman Sir Iain Vallance said...* but if you write *The Chairman, Sir Iain Vallance, said...* you must have both commas.

The test is whether, grammatically, the sentence would still hold up if the section between the commas disappeared. The common mistake is to forget the second comma. It happens often after abbreviations - *a unit handling literature, known as the Customer Communications Unit (CCU) is based in London*. The second comma, after (CCU), has gone missing.

By contrast *The Customer Communications Unit that handles literature is based in London* needs no commas at all, because the phrase *that handles literature* is actually defining what the sentence is about, rather than adding extra information.

Commas are needed, and are not optional, when someone or something is being addressed. *Kiss me, Hardy* must take the comma after *me*. *Yes Minister* should have been *Yes, Minister*. Note that what's addressed need not be a person - *Don't cry for me, Argentina* is correct.

Pairs of commas should also be used when *however, say, meanwhile and for instance* are interjected into sentences - *we can, for example, run optical fibre cables to Europe without repeaters; she might be paid, say, £30,000 a year*.

At the beginning of a sentence, these words and phrases need to be cordoned off with a single comma - *However, discussions with MCI, For instance, if we look at...*

Commas are also used to mark off separate items in a list, except, usually, between the last two items. You can put a comma in before *and* if it's needed to make the sense clear - *Goods are transported in Romania by lorry, horse and cart, and even handcart*.

A string of adjectives usually takes commas after each one except the last - *old, crabby, pedantic Dr Johnson*.

QUOTATION MARKS

A good rule is to use double quote marks (“ ”) to enclose direct speech.

Use a colon, not a comma, before quotes - *Mr Smith said: "This is good news for business customers."*

Use a comma after quotes (before the quote marks) - *"It will help many small traders," said Mr Smith.*

Punctuation marks usually go inside quote marks.

LEAVE IT OUT - THE WORDS WE SEE TOO MUCH OF

Writing can often be made clearer and more vivid simply by using shorter, more familiar words. In the list that follows, A>B does not mean that A is better than B at all times and in all contexts. But it does mean that whenever a B-word or phrase looms on the mental horizon, it is well worth asking oneself whether the related A-word might do the job better.

<<A>>	<>
ability	competence
about	in the region of; approximately, concerning, with regard to, in reference to, re
after	subsequent to, following
although	despite the fact that, notwithstanding the fact that
apply	put into practice, implement, capitalise on, avail oneself of; have recourse to, utilise
as if	like
because of	as a result of, in view of; against the background of
before	prior to, preparatory to
begin	commence, roll out
big	massive, significant, substantial, voluminous
buy	purchase, procure, requisition
carry out	implement
caused by	occasioned by, leveraged by
clothing	attire
continuing	ongoing
deep	profound
detailed	in-depth

Written Communications

disappoint	leave much to be desired
do	implement, realise, serve, suffice
during	during the course of
end	cease, terminate, finalise, conclude
enough	sufficient, adequate (<i>recast sentence if necessary</i>)
examine	critique, analyse
full	filled to capacity
from	as from
gap	hiatus, dichotomy, schism, discontinuity
go	proceed, progress, migrate
holiday	annual leave, vacation
home	residence, domicile
idea	concept, philosophy
in	within, inside the parameters of
job	post, position, employment opportunity, function, task, chore, duties
last	ultimate
later	subsequent
method	methodology
most	the majority of
neat	adjacent to, in the region of; in proximity to
needs	requirements necessities
now	currently, at this moment in time, under present circumstances, as of this moment, at this juncture
open	inaugurate
partly	partially
put	position, locate, site, deploy, pose
right	appropriate
say	state, declare
shop	retail outlet, store, customer-facing environment
so	accordingly
speed up	expedite, fast track
start	initiate, commence
start again	start over, recommence
take part	participate
tell	acquaint with the facts
think about	give consideration to
then	thereafter, subsequently
to	in order to, with the intention of
try	endeavour, explore the possibility of
value	cost-effectiveness
very	massively, phenomenally extraordinarily,

Written Communications

	significantly
want	requirement, deficit, shortcoming
wholly	comprehensively
wide	extensive, encyclopaedic
woke	awakened
workable	feasible

SECTION D - VISITS & PRESENTATIONS

D-1 Planning the visit

- What is it the client wants to achieve?
- How will the client make this decision?
- How does the decision process work?
- What are the buying criteria?
- What are the client's priorities?
- Who are your competitors?
- What is the client's view of the competitors?
- When will competitors make their presentations?
- Where do you stand in rank among these competitors? How does the client feel about you?
- What concerns, reservations does the client have about you or your organisation?
- What are the client's time-frames for making the decision?
- How does the client's manager feel about the product you are selling? (If the client hasn't discussed it yet with manager, the sales cycle will probably be longer.)
- What is the budget? (Is there one?)
- Greeting and introduction
- Summary / hinge (referral)
- Objective / purpose / agenda
- Time check (optional)
- Bridge to needs

D-2 Sales Pitches and 'Beauty Contests'

- Confirm the identity of your targets - their **corporate** identity and image. Their **individual identity**, like and dislikes.
- Find out / confirm in advance and precisely - what do they want? If possible, probe, discuss and amplify their written requirements. Who are your (or your likely) competitors?
- Choose your team. Who? What expertise and experience? Seniority? Who will chair? In what order should they speak?
- Consider: What will win? What are your advantages over your opposition, and how can these be maximised?
- What are your disadvantages, and how can these be minimised?
- Prepare your case, your material, yourselves, and rehearse.
- Consider presentation methods: Certainly, documentation; and visual aids?

If you are heading a team that's selling, remember:

- Success or failure depends on the personal impression that you make on your audience - and the way that you lead and control your team.
- Accept responsibility for full preparation of your corporate/team case.
- Keep calm, cool, and in control. Watch your audience - and be prepared to change course if the unexpected occurs, or if you can see that you're not making the right impression or progress.

D-3 *Communication Skills Checklist*

- Eye contact
- Open Gestures
- Don't fiddle or point
- Don't wander or fidget
- Posture - sit and stand up
- Don't hang onto the furniture
- Smile - if appropriate!
- Don't 'er' or 'um'
- Articulate - don't mumble
- Use the pause - to breathe and to think
- Vary the pitch and pace of your voice
- Set the tone
- Use positive language
- Summarise
- DON'T PANIC - be assertive**

D-4 Style

You need to decide what the audience style is and adjust your pitch accordingly:

- **Pragmatic** - wants to learn, wants information and facts, a good time manager, short answers, probably “a fighter”, desire to win, assertive, persuader, makes quick decisions.
- **Extrovert** - emotional, generally warm and friendly, cluttered, enthusiastic, can influence people, makes quick decisions, not a great finisher, able to say no and wants to have a good time!
- **Analytical** - wants to know every detail, accurate, thoughtful, slow, unemotional, precise, wants questions, not assertive, wants order, fairly rigid and sometimes detached.
- **Amiable** - emotional, can't say no, passive, wants agreement, doesn't set up barriers, not assertive, not very good at time management, finds delegation difficult, likes to keep everybody happy.

With the Pragmatic and Extrovert don't overload, concentrate on giving information, facts and answers. With the Extrovert be enthusiastic. The Analytical and Amiable want questions. Be accurate and give detail to the Analytical, whilst show care and concern with the Amiable.

D-5 Asking Questions and Listening

TYPES OF QUESTIONS

Ask the following types:

Open <i>Rather than</i> Closed	“tell me about...” <i>rather than</i> “how old were you then...”
Probing	“exactly what happened next...”
Hypothetical	“what would you do if...”
Leading	“and if you could do it again.....?”

And if asked the following: types:

Real / Fact	these are easy to answer with good preparation
Opinion	don't give unless really pressed -limit your liability! Opinions can often come back to haunt you! <i>If you have to give an opinion, make it clear whether it's yours or your company's</i> <i>If you don't want to express one – say so and give the reason why.</i>
Unanswerable	tell the truth or buy yourself time “I'll find out and come back to you...”
Hostile / emotional	empathise, clarify and take responsibility. Don't be hostile in response – diffuse any tension, not escalate it!
Multiple	Get the questioner to break it down and clarify. Deal calmly with each point in turn. <i>Ask yourself, 'what is the questioner really trying to find out?'</i>
Dumb	don't make the questioner feel “stupid” – deal with the question politely efficiently and professionally! “I'll explain more clearly...” or “Let me try again....”

Complex	ask for clarification
----------------	-----------------------

As important as asking the right question is to acquire the skill of
Listening!

ACTIVE LISTENING

- Eye contact
- Body language
- Concentration
- Repetition and summary
- Use silence
- Empathise
- Avoid interruptions
- Encouragement

D-6 Range of Questions

Preface.

To make both you and your client more comfortable with your questions and to help you ask *tough* questions, soften the question with an introductory explanation of why you are asking. As you preface, show the client the reasons or benefits to the client in answering the question.

Prefacing shows sensitivity and makes the client feel more comfortable. This is particularly helpful for those tough-to-ask questions such as, "What return are you getting?" "What is your budget?" "Who else are you talking to?" "What are the numbers?" A phrase such as, "So I can make sure I am on track with your budget, may I ask what amount you...?" can make everybody more at ease.

Decision-Making Questions

- Who are the key contacts on the account - decision makers and influencers?

"How does your decision-making process work?" "Who will be involved?" "How long do you need to reach a decision?"

Operation Questions

- "How do you do it?" (How does the client's production or organization work?)
- "How many or how often...? What is their...?"
- "What budget have you set?" (Does this customer qualify?)

Need Questions

- "What are you looking to achieve?" "How is that working?"
- "To what extent have you bought . . . ?" (Likes / dislikes - what does the client buy / not buy?)

Questions are the tools to help you help your clients. They get beneath the surface of demands, and they expose needs. When the client says, "I don't like it," it is tempting to try to persuade him or her to like it, but more often than not that is a futile effort - a tit-for-tat - where even if you get the last word the client normally wins. You will get further with a question to help you find out what's behind the client's thinking: "So Sue, may I ask what it is you don't like?" Once you ask a question, take full advantage of it - be silent, listen, use the information.

Visits & Presentations

Strategy Questions

- "What is your strategy / thinking in...?"
- "May I ask why you want to go from X to Y?" (For example, manual to computer - find out why the customer wants to change).
- "How will... affect autonomy of..." (Changing roles in client organization).
- "Longer range, how are you.. ?" (Checking the 5-year plan).

Problem Questions

- "What is going on? What would your ideal situation be?" "What gaps do you see? (Don't ask this question too early - the right to have it answered must be earned.)

Relationship Questions

- "How are we doing?" (How the client sees the relationship with you, performance, and his or her relationship with competitors.)
- "Am I doing the right thing?" "What do you want me to do?" (Action steps.)
(How you as an individual salesperson are meeting the client's needs.)
- "How satisfied have you been with our service except for this?"
"How do you feel we handled...?"
- "Is our billing detailed and timely enough for you?" (Logistics of the account.)
- "When is a good time to call?" "When shall I call back?"
- "May I ask who you do business with?" "Who is the best?"
"What do you like about them?" "Who else do you work with?"
- "Who else have you spoken to?" "Have you received proposals?"
"What do you think...?"

Interpersonal Questions

- "Where do you live?" "Where do you go on vacation?" (What are the client's interests, family, situation?)

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The following questioning skills can be invaluable to you as you expand your range and number of questions.

D-7 Handling Questions

Understand:

Listen to the objection and make sure you understand it. Never argue back – it may seem a minor detail to you but to your prospect it may be very real.

Pause before replying (Use the power of silence)
Restate the question if you feel it necessary

Give yourself time to think, time for a prospect to qualify the objection – they may answer it themselves

Question if you need further clarification.

Also, before responding, use this opportunity to make sure there are no further objections. This will avoid a ‘shopping list’ of objections as soon as you have satisfied the first one. It is better to get all objections into the open, allowing you to move forward with a trial close.

Respond

Re-assure the prospect that you have acknowledged his objection. If you don’t have the answer make a commitment as to when you will be able to reply. Don’t hedge.

Pricing is a tricky subject – try and position the value of the complete offer, product services management etc. Often the objection is a false one, try and uncover the real objection so that it can be countered.

Confirm:

When you have removed any objections, get the prospect to confirm he is happy with your responses, then trial close - - ”*if I solve these issues can we move forward to implementing the service?*”

Use:

- P - State your Position
- R - Give a Reason
- E - Give an Example
- R - Re-state your position

D-8 Assertiveness

Assertive behaviour involves standing up for your own rights in such a way that you do not violate another person's rights. Involves expressing thoughts, feelings and beliefs in direct, honest and appropriate ways. Debate and negotiate.

Non-assertive behaviour involves a failure to stand up for your own rights, or doing so in such a way that others can easily disregard them. Involves expressing your thoughts, feelings or beliefs in apologetic, diffident and self-effacing ways. Involves failure to express honest thoughts, feelings or beliefs. Fight!

Aggressive behaviour involves standing up for your own rights in such a way that you violate the rights of another person. Involves expressing thoughts, feelings and beliefs, which may be honest or dishonest, but often-inappropriate ways. Fight!

BEING ASSERTIVE -

- Be prepared to say “no”
- Know your own strengths and weaknesses
- Always be positive - concentrate on what you can do, not on what you can't do
- Maintain good eye contact
- Develop and use positive body language
- Separate fact from opinion
- Be honest and open about your own feelings
- Know what you want to achieve
- Recognise the feelings and desires of others
- Recognise the other person will have thoughts, ideas and feelings
- Speak clearly and fluently
- Listen well
- Accept responsibility

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AND FINALLY.....

PREPARATION

Remember the four questions

- WHO?** -is your audience?
.....holds the power?
- WHAT?** - is their level of knowledge?
.....are their needs, concerns?
.....*matters* to them?
.....are their expectations?
.....is *your* objective?
- WHY?** -are you there?
....what is your message?
- HOW?** -many are there? Balance the sides!
....will you dress?
....will you present?
....will you get your message across?

- Prepare your material
- Set the tone
- Be positive, be clear, be brief

D-9 Presentations

The client may make a decision on the basis of a postal submission. In many cases, however, you will be invited to present your proposal in person. *Brain Storm* the main ideas – no matter how silly, let the ideas flow with the view of editing them later. Try and end up with between two and five *main* ideas – more than that will overload and make your presentation confusing.

Questions to consider for the live presentation include:

- Has everyone in the client team had sight of your proposal prior to the presentation?
- If you have responded to the client's request by posting copies in advance of the presentation, is it safe to assume that every member of the client team has read your document?
- Can you deliver a clear overview of your message, (summary of the main point, the supporting branches and the most important supporting points) in 10 - 15 minutes? The answer is always yes. Any message, however complex, can be reduced to its essentials.
- How can you present your argument in the most visual and memorable way? Have you designed a slide that clearly lists the client benefits?
- Do you generate client questions during the summary presentation - or leave it as an uninterrupted "big picture" overview?
- How do we ensure the discussion after the summary presentation is client driven? By revisiting each branch of our argument in turn? Or by inviting the client to choose which topics he wants to cover?
- Don't be tempted to spend a great deal of time (and especially not at the start) on the history of your company – if you have been invited to give a presentation they will have done their homework on you before the invitation!
- Be concise and to the point – don't waffle!
- Humour – don't use this unless you are absolutely comfortable in doing so – nothing is more embarrassing than a joke that falls flat! A better way is to use an anecdote or story to make a point, or ask a rhetorical question
- Avoid clichés!
- Possibly use a shock question or statement to open the

Visits & Presentations

presentation and make people sit up

- Is it an *Informative* presentation (delivering facts) or a *Persuasive* presentation (trying to change someone's behaviour, attitudes or beliefs)
- Involve your audience – ask questions or opinions of *them* during the presentation
- Check on audience understanding
 - “Is that clear.....?”
 - “Any questions so far...?”

D-10 General Concepts of Presentation / Delivery

Mistakes:

NEVER read – if you have to use prompt cards but restrict to main headings only.

NEVER stand behind a lectern unless unavoidable – YOU are the focus, not the screen.

AVOID clichés and words such as ‘actually’ or ‘basically’

DON’T use ‘I’ instead of ‘You’ or ‘Your’ – your audience are the only ones that matter!

Delivery Skills:

You must communicate your knowledge and enthusiasm to the audience. Standing stiffly with little animation in your body and speaking in a monotone voice without good eye contact is a sure way to turn an audience off. Non-verbal actions are very important and if these channels get cut off because of nerves, your rapport with the audience will suffer.

A presentation is not a monologue – invite participation! Use a natural conversational style and try and relate to people in a direct and friendly manner. You must learn to be aware not only of what you are saying but also *how* you are saying it! It is a fact that most audiences are impressed more with *how* you say things than *what* you say!

DRESS

- White shirt conveys honesty
- Dark Business Suit conveys a sense of power
- Lightweight is best to help prevent perspiring

However, there may be occasions where this is not the rule eg if the presentation is to a fashion or musical or internet company where the style amongst themselves is more casual. ‘Dress as the client dresses’ is a good rule of thumb.

VISUALS

Visual aids must ADD, not detract, from your presentation – if you are using them purely as a prompt for yourself they are the wrong slides!

Visits & Presentations

Always, where possible, use your own equipment when presenting – especially the laptop, as you may find that maybe the right version of software is not present or that the resolutions are different.

To save any confusion or embarrassment in loading the presentation, why not add a shortcut to the desktop area of your computer?

It's always a good idea to make the very first slide *personal* eg "Presentation to ABC Company....." using their logo if possible, which makes it more personal – showing that it was designed *just* for them.

Specifically, try and introduce illustrations on the slides to emphasise specific messages or figures – but try and get away from standard illustrations – and don't add just for the sake of it!

Remember also that '*Less is More*' – concentrate on *fewer* points but *better* material, illustrate for impact and memorability.

When turning to a new slide don't repeat the words on the visual – they can read it themselves!

BEFORE THE EVENT

The Room:

- Visit the actual room beforehand
- Make a sketch
- Note the electrical points and windows
- Check the lighting and whether it can be controlled easily – ideally the lights should remain sufficient that reaction can be judged
- Is the screen area adequate? (Ideally at least 60" x 60")
- What is its position? If straight on, try and angle it so the focus of attention is the speaker
- Think about seating arrangements and make sure someone from your company is in a position to judge reaction
- Do you intend to issue handouts before the presentation? This is not usually a good idea unless it is a very large event – people will spend their time looking through these instead of listening to YOU!

ON THE DAY:

(in private)

- Get yourself psyched up by exercising both the body and voice

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- Move the mouth and tongue in all directions to loosen the muscles
- Exercise your arms and legs to get the adrenalin going!

At the START:

- Breathe deeply from the diaphragm –fill the lungs with air
- Make eye contact with someone at the back of the room
- Assess the audience
 - Determine the pitch of the presentation (business or technical oriented?) You may have to do some quick re-thinking!
- Look pleased to be there – *smile!*
- Pause a few seconds before starting
- Use louder voice (it sounds louder to yourself)
- Clarify whether questions are to be taken along the way or at the end
- Also confirm the handout policy – either available now or at the end

POSTURE:

- The presenter should stand alongside the screen, not the Computer (try and avoid overhead projectors these days)
- Feet should be 12/18 inches apart, weight evenly distributed
- Arms should be at your side, don't fold them or hold them behind or in front of you
- Don't pace to and fro
- Don't fidget

VOICE

- Contrary to belief, water makes the mouth dry – it does *not* relax the throat muscles - a hot drink is far more beneficial
- Produce saliva yourself by chewing on your tongue
- Communicate with enthusiasm
- Don't talk too fast – a *very* common problem. Slow down!
- Vary the pitch and tone of the voice – however good the message, a monotone delivery will switch an audience off!
- Avoid letting the voice drop at the end of a statement
- Talk to your *audience*, not the screen!
- And remember - keep the voice loud and aimed at the back of the room, sometimes even ask the question “can you hear me ok at the back?”

Visits & Presentations

GESTURES:

- Should come from the shoulder and should 'precede the phrase'
- Use to emphasise statements / verbs
- Don't overdo!
- Don't hold pointers
- Underline points with sweeping hand movements, *not* fingers

EYE CONTACT:

- Lack of eye contact is the single biggest giveaway of the nervousness / lack of confidence of the presenter!
- Don't scan the audience
- Focus on a person for about 3/5 seconds each
- Longer when *very* nervous or there is a bad group reaction
- Finish a statement or idea before moving eye contact

PAUSES:

- The greatest trick of all! – IF you can execute it correctly!
- Certainly at the start of the presentation
- Always after an important idea – a few seconds
- At the end when inviting questions – they *will* come!

QUESTIONS AND ANSWERS:

Encourage your audience to ask questions. If there is no immediate response, pause in silence – this gives them time to think and invariably provokes someone to ask! If none are forthcoming it is a sure sign that your message has not got through and that they are not interested!

While a question is being asked, concentrate and listen carefully.

Repeat the question, (unless it is highly negative or contentious). This serves two purposes – it makes sure everyone has heard it and it gives *you* time to formulate the *appropriate* answer (not always the correct answer!)

Try and use short answers or the debate will get bogged down – if someone raises a point that is specific to them – take it offline later.

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Don't use answers such as "in my opinion or I think...." If the answer is not known, be honest enough to admit it with the promise to find and get back to them

Remember – *come prepared! Correct preparation gives an inner confidence and if you have done your planning you will have asked yourself the five worst questions that could be asked – and have your response ready!*

D-11 *Structure of the Presentation*

Have a *clear plan* about the structure of your presentation. Know how long each section should take and it's divisions. Try and be concise and keep to that time!

Overview	What will be covered and recommended
The Issue / Problem	Why it exists <i>and consequences of not addressing it</i>
The Idea / Solution	The approach and why it will solve the problem
The Benefits	Try the ' <i>so what</i> ' test Explain why it must be done
The Evidence	Proof that it will: Statistics / Facts / similar experiences (don't overdo – can be seen as boasting)
Action needed	What is needed to proceed – don't be afraid to <i>ask</i> for something – even if it's agreement to proceed to the next stage.
Summary	Re-cap what has been said....the problem is.....the solution is.....the benefits of doing this are.....the evidence shows.....the dangers of not doing this are...to continue we'll need.... <i>Thank you!</i>

Decide if it's a Team Presentation.

It is vital that, in everything you do, you demonstrate to the client that you work effectively as a team.

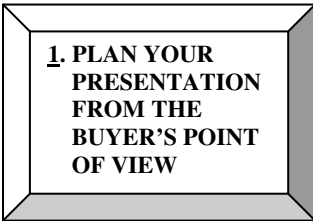
- Choose your leader / Chair - who has the authority / will make the impact? From the start the Leader must have control – avoiding disputes and public disagreements and deciding who speaks and who answers each question
- What is the specific role of every member of the presentation team - for example, chairing the discussion, noting down client concerns, time management, visual

Visits & Presentations

aids, setting the agenda, dealing with fees, wrapping the presentation etc

- Which members of the project team will deliver the presentation?
- Clearly define *and understand* each member's role beforehand
- When and how will you introduce each other - briefly by name when you arrive, or in more detail before each team member's contribution?
- What information do you need to include in those introductions - for example, that person's credentials, their role and the importance of their message to the client?
- How will questions be handled? Who will decide who answers each question – the Chair should have the authority!
- Identify your strengths and weaknesses. Decide how to maximise the former and minimise the latter
- Prepare your visual aids carefully – no errors on them!
- Rehearse together, if possible with an independent assessor
- Practice 'passing the baton'...the aim is for nice smooth handovers!
- Prepare for the questions you want and especially for those you don't want but know will come!
- Do your homework! Know your subject, audience and your team

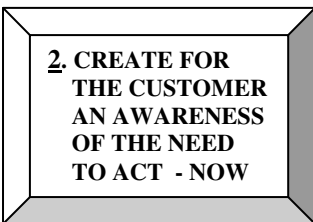
OVERVIEW



- Make your customer feel important by basing your discussion firmly on *their* key objective
- Test your understanding of the most important issues or problems your listener faces. From *their* viewpoint, *not yours*
- Remember that their present point of view is based on their past success and makes absolute sense to them. To change it will require compelling reasons
- Match your mood and manner to that of your customer
- What are your Aims and Objectives

THE ISSUE / PROBLEM

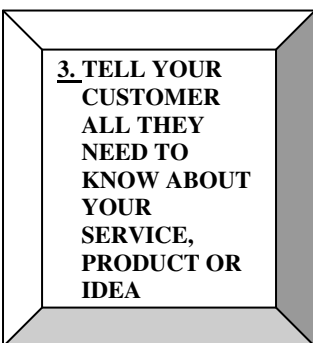
When the listener confirms that your assessment of their requirements is correct.



- Demonstrate that conditions beyond the control of either of you are changing
- Show how the changes taking place could cause your listener problems in the future
 - How has this arisen
 - Why it's a problem
 - How it affects people / business – dramatise it!
 - Consequences if not addressed
- Indicate that you have the means to change potential threats to opportunities

THE IDEA / SOLUTION

Now is your chance to paint a picture, arouse positive feelings or simply express your idea in detail. Explain in sufficient detail.



- What you offer
 - the options
 - your choice and why
 - other ideas considered and rejected (and why)
 - practicality
 - price
- When you can supply it
- Who else will be involved
- What special skills and knowledge you uniquely offer
- Key features which give assurance that the promised

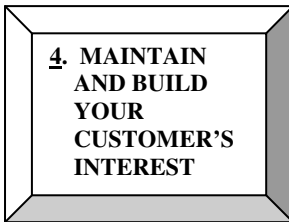
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benefits will materialise

- Who else, that they respect, has already successfully used your services or products
- What they say about the experience (if you have their permission to quote them)

THE BENEFITS

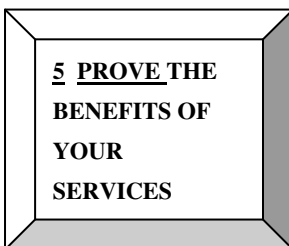
Be sure that the listener's apathy is replaced by an interest in hearing what you have to say and increase their enthusiasm:



- Mention one or two benefits that the customer will gain from using your services, products or ideas before indicating what you will do
- Make sure they regard these as benefits and appreciate their worth

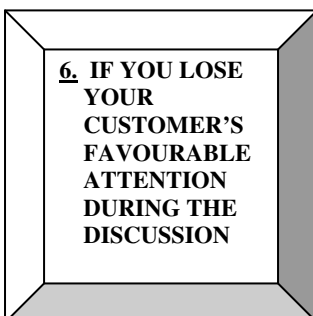
THE EVIDENCE

Link the benefits logically to prove that if one is achieved the others follow as a consequence. Show that the final benefit in your parallel logic is the listener's key objective.



EVERYTHING GOING OK????

If not.....



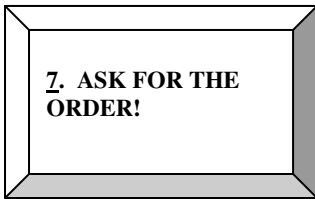
- Change the pace or content or stop talking
- Wait for your customer to speak
- Listen actively
- Show that you have listened by repeating a key idea or feeling in our own words
- Diffuse the emotion by showing that you understand the right of the Customer to react in any way that feels right to them
- Deal with their problem
- Continue when you are convinced that they are satisfied and ready to listen, not before

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As part of the Planning you will have written down the five worst questions your audience could ask –*and have the answers prepared!!*

THE ACTIONS

No tricks or dosing techniques - just ask. Look for ‘buying signals’:



- nods of agreement or approval
- building on your ideas
- willingness to give you supportive information or data

Having asked - stop talking and remain silent until you have a reply.

The Medium and the Message

The way you look, behave and communicate provides evidence of your professional standards, your attention to detail and your commitment to excellence. Questions to ask here include:

- Is the language you use decisive and authoritative?
- Have you banished "clutter" from your presentation ("actually", "basically", "um" and "er"?)
- Is your style of delivery enthusiastic and energised?
- Do you **look** professional - clothes, personal grooming, missing buttons etc? Do you maintain eye contact?
- Do you listen to the client **and** prove you are listening by summarising, clarifying and reflecting back?
- Do you look and sound proud of your organisation and of your advice?
- Is your body language open, authoritative and confident?
- Can you be heard? Are you projecting and using your voices effectively?

D12 Fees and Charges

When pitching, be prepared to talk fees or charges.

- Decide beforehand whether to talk about money yourself or to let others do so.
- If asked questions, answer them. But work out the best answers in advance.
- Decide who answers and make sure that everyone is fully briefed.
- Above all: avoid disputes with other team members. Don't let them prod you into disagreement.

Questions to expect:

'Is that negotiable?'

'Do you charge on a time basis?'

Can it be done on a Fixed Price basis?

'What is your estimate of the costs involved and how firm is it?'

'How do your fees compare with other firms and big companies in the field?'

'Will you yourself be responsible for deciding our fee / charges?'

Never apologise. Instead, emphasise the positive. Consider these responses: –

'Our charges are competitive. We provide top service. Clients stay with us and recommend us to others because we provide the best value for money.'

'What matters to you is not the charge out rate but your eventual cost. We employ and train the brightest and we take pride in providing top value for money. We have grown enormously in the last few years - because our clients are satisfied with our products and services.'

'We supply top services at the most competitive prices - or we wouldn't be building our business as we are. What we won't do is to cut our prices so that we have to skimp on the service.'

Preparation is vital for all presentations, but cross-examination by colleagues about charges and fees is crucial. Keep cool and calm. Use the usual techniques to avoid showing nervousness, especially eye

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control, pausing, staying still and avoiding any indication of agitation.

Recognise that people whom you intend to charge are entitled to query, challenge or negotiate those charges. If you want to make other people's business part of yours, do not resent fee talk. Prepare for it.

WHY PEOPLE SAY 'YES'

1. They want what you have to offer
2. They need, or think they need, your product or services.
3. They think it will benefit their company
4. They are not happy with their present suppliers and want to change
5. They want to take advantage of discounts
6. They fear that if they don't buy now, they will have to pay more later on
7. They have heard that a rival has done well with your product or service
8. They like making bold decisions!
9. They think it will make them look good!
10. They are in a hurry!
11. They don't have the courage to say 'No'!
12. They like you!

WHY PEOPLE SAY 'NO'

- 1 They only wanted to find out if you had any good ideas.
- 2 They haven't understood your presentation
- 3 They are simply not convinced
- 4 They haven't been listening
- 5 They don't like the colour / shape / feel of your product
- 6 They are worried about your after-sales service
- 7 They don't have the authority to make decisions
- 8 They know someone who will make a better of
- 9 They hope you will come back and improve your terms
- 10 They are afraid of the consequences of saying 'Yes'
- 11 They hate making decisions
- 12 They don't like change
- 13 They haven't got the money
- 14 They are tired / in the wrong mood
- 15 They don't like you!

Visits & Presentations

Why organizations lose customers

Percentage Reason	Answers
% of customers die.	1%
% of customers move away.	3%
% of customers float from one company to another	4%
% of customers change firms because of a friend's recommendation.	7%
% of customers stop dealing with companies because staff are indifferent or show little interest.	68%
% of customers are chronic complainers.	8%
% of customers change because they can buy more cheaply elsewhere.	9%

SECTION E – ACCOUNT DEVELOPMENT

E-1 Purpose

This process outlines how to find, develop and close new business in an existing client. It shows account managers the stages and activities that are essential to closing sales – significant in both value and in opening up further opportunities. The checklist summarises the detail of the process map so that selling actions are complete and geared to the goals of the company.

The benefits are:

- More proactive and more customer facing actions
- Better marketing and sales information
- More integration across accounts
- Spread of improvement across all accounts to achieve a common approach
- Higher client satisfaction since services are properly packaged to meet perceived and expected requirements
- Performance measurement and reporting that match each particular situation
- More effective and efficient use of staff time since it is concentrated on the important sales issues
- More business at higher margins

Why do you need a process?

- To uncover business opportunities in existing clients
- To achieve better practice in professional services selling
- Need an action checklist
- Needs monitoring

Higher sales from existing accounts

Benefits

- More client facing actions
- Better marketing and sales information
- More integration across accounts
- Improvement through the common approach
- Packaged services → meet needs → higher satisfaction
- Tailored internal performance measurement
- Focus on important tasks - more effective and efficient staff

More business at higher margins

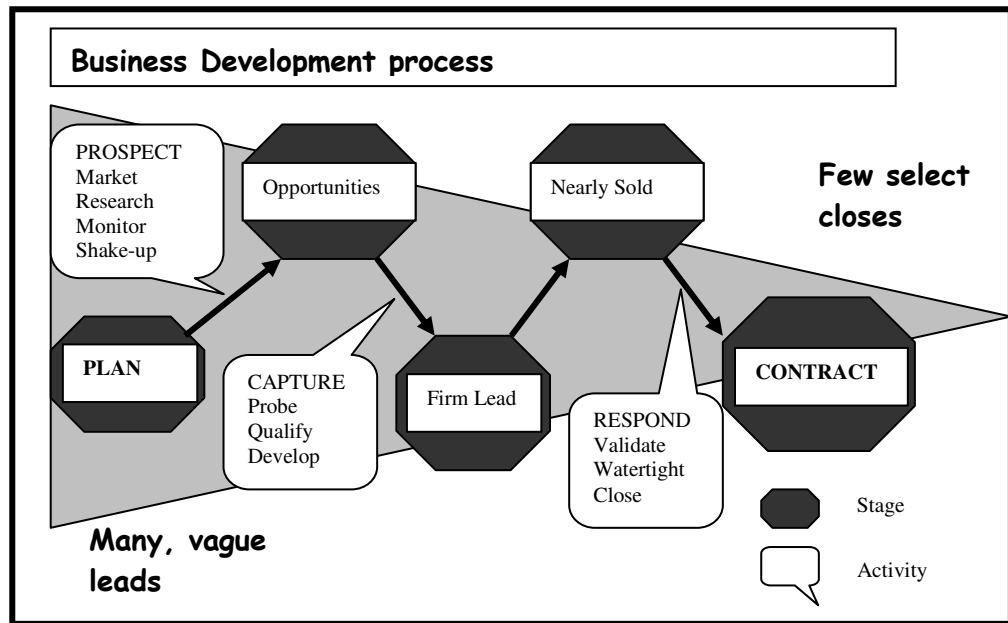
E-2 *Scope*

The diagram summarises the account development process:

- It uses best practices based on many years experience of account managers.
- Activities are emphasised in terms of the smoother, softer selling process required for a complex product/service
- It stresses the need for higher activity to achieve the target value of closes

Not included in the process are:

- Business from branch new customers
- Activities for smaller value sales that may not justify the fuller one-to-one selling typical of professional services
- Official bid requests and more speculative selling activities
- Involvement of sales staff
- Normal account management after sale



General points are:

- ❑ The process is a cycle that is iterative at every activity in order to generate the flow of sales possibilities through the sales funnel or pipeline
- ❑ It separates the process into stages, from planning to contract, in order to facilitate organising and reporting
- ❑ The account plan, as prepared by the account manager, is a key part of this process
- ❑ The Director of Sales and Marketing must be available to discuss strategies and assist, although this process assumes that account managers will not become professional sales resources and will be working largely on their own
- ❑ The Director of Sales and Marketing will also be available to contribute to the overall approach. The nominated account manager is responsible for ensuring the best possible commercial relationships with one large client, and will be responsible for ensuring delivery of the required services to the client
- ❑ The account process must confirm to the overall company quality standards
- ❑ Systems should be developed/purchased to automate the process
- ❑ Where appropriate, links with other areas within your own organisation should be maintained

The remainder of the process covers:

- **Individual stages**
- **Activities with tips and warnings**
- **Checklist for a general account review**
- **Procedure (with timetable)**

E-4 Stage: Plan

Sales Probability 0-20%

The account plan stage is the starting point for the process. It confirms pre-requisites for all marketing and selling that follows.

1. Existence of a marketing and selling strategy (account plan) for all relevant services that outlines the sales plan and provides intelligence, information and targets, such as:
 - Company business and IT environment
 - Key personnel structure chart – note also their personal traits and interests
 - Your business to date / account history
 - Competitor analysis
 - Objectives and specific targets
 - Actions and dates required to cross-sell your other services
 - Actions and dates required to secure longer / higher value contracts with client
 - SWOT analysis
 - Communications plan

2. Sufficient skills to do the tasks in account development:
 - Market knowledge
 - Sector knowledge
 - Product knowledge
 - Consultative selling skills

3. Adequate and appropriate structure and support:
 - Sufficient support resources to release account \managers' time and effort
 - Sales administration system update to record contacts and activities

Warning:

If it is not in place then the ability to succeed is impaired

E-5 Activity: Prospect

Even though the client will already be known, the account manager has to *prospect* as though this were a new client.

There are four sub-activities

1. **Market: create, build and maintain programmes for bringing contact**
 - Translate actions in the account plan into integrated programmes that maximise contact with the client
 - Identify specific entry points into the client (which in a large corporate are many)

2. **Research: collect, analyse and present target sector information**
 - Collect data relevant to the client and summarise professionally
 - Identify the right people, especially those involved in change
 - Make sure all names, titles and responsibilities (with their personal interests) are accurately recorded
 - Classify the various roles of key contacts:
 - ❖ Gatekeepers
 - ❖ Advisers
 - ❖ Influencers
 - ❖ Movers and shakers
 - ❖ Decision makers
 - Be familiar with the key factors in front of the client – ask about the *business issues*, e.g. costs or skills
 - Make the most of information sources within your own company
 - Collate and review client satisfaction reports
 - Keep the organisational structure chart and telephone contact list up-to-date – it is a good excuse to talk to the client!

3. **Monitor: set targets and measure**
 - Re-visit old contacts and use them for introductions
 - Test for ‘hot buttons’ that excite the client’s interest
 - Highlight clues about possible client intentions
 - Explore possible needs by playing them back to the key contacts
 - Update records
 - Begin to assess the probability of success and continue to assess through all activities

4. **Shake up: stir up the client and do it all yourself**
 - Perturb the client by asking direct questions, challenging existing relationships, querying current methods and analysing adopted solutions
 - Hit with literature and other material collected
 - Make the contact again, with stimuli relevant to the client
 - Always leave some gem of knowledge or advice
 - Attend all meetings – always arrange another meeting at the same time
 - Step up through the client levels to the most senior staff

Warning:

- There must be enough internal champions, willing to speak up for IT and direct business into the company
- This will take up a lot of time - allow for it
- All time with clients is *quality time* - the more the better
- However, the quality of the communications can be decisive - watch those typos in letters, don't be late for meetings, if you have said you will call make \sure you do etc.

Prospects	
Account development tips	Has it worked?
Integrated programmes	Increased contacts
Entry points into client	Measurable flow of opportunities
Information	
Information	Warning!
Information	No plan, no result
Test for hot buttons	Make time for prospecting
Playback	It's a long haul
	Watch the P's and Q's
	Act bravely
Stir and simmer	

Walk the floors, knock the doors!

E-6 Stage: Opportunities

At this stage, the account manager has the advantages of quality but limited information about prospects.

Sales Probability 20-40%

Achievement:

- You understand the opportunity as:
Reactive – you are in a position to influence events to get into the buying cycle at the right point
An undefined business problem – you can influence the identification and solution for problems of which the client is not fully aware
- You have gained attention
- The client sees benefits in the relationship, either in business or personal terms – preferably both
- Use occasional lunches or external leisure activities to establish key customer relationships

Performance

- Contacts in increased numbers and quality
- Correct flow of opportunities into the sales pipeline
- 3-6 identified opportunities at any one time
- Each major account should have a minimum of two internal champions with 10-12 contacts in total at various levels of familiarity (real friends, happy to meet, just a contact)

Warning:

- **The good work may be wasted if it is not continuous – don't let up!**
- **Guard against damaging dissatisfaction caused through poor delivery by attending progress meetings randomly and watching for signs of discontent**
- **Act immediately, decisively and bravely when things go wrong**

E-7 Activity: Capture

What is important now is to tie the client to your company in every possible way. There are three sub-activities:

**Lock In
Lock Out**

- 1. Probe: identify the client's problems and issues**
 - Get more relevant information, for example by organising seminars in areas of interest
 - Identify business issues and current challenges
 - Make the clients 'wallow in the misery' of their problems!
 - Run events with just enough hospitality to win friends and cement relationships

- 2. Quantify: Investigate the background of the client and its personnel**
 - Arrange meeting with key players to uncover the real issues
 - Talk to other parts of your company about their experiences with the client
 - Assess the quality of the opportunity (check the Opportunity evaluation in the appendices)
 - Who needs talking to prepare the ground?
 - Who will the main negotiations be with?

- 3. Develop: resolve issues into coherent campaigns**
 - Define the client's needs precisely – and it will not be all IT and cost related eg the ability to be flexible and to respond quickly to changes
 - Be prepared to show that your company is client-centred, has experience of the client's sector and competitors and has general knowledge of the IT industry
 - Understand clients' needs before positioning your own company
 - Match carefully the client's needs to your company's capabilities
 - What obstacles need to be overcome?
 - What materials/information needs developing by whom and when?
 - What are the detailed steps needed for a successful conclusion?
 - Assess the degree of customisation required from the 'standard' product/service – no bending over backwards or offering what resources/skills happen to be available
 - Confirm capabilities internally and sound out likely candidates for additional 'winning moves'
 - Be in a position to produce a business case by being in touch with the clients' constituent parts from users to IT
 - Cultivate a good relationship with the clients' IT management
 - Become a supplier of choice and strive to influence clients' decision making – but do not let up on the marketing and selling

Warning:

- **Be cautious with confidential information – you will be in a competitive situation**

Capture

Account development tips

Expose the raw nerves
Get to the bottom of things

Know the context
Convert opportunities into quality leads

Define the client's needs
Match needs to delivery capabilities
Be the supplier of choice

Has it worked?

Leads to write home about
Documented intelligence

Warning!

Concentrate on the best leads
One false step - a total loss

Winning moves

E-8 Stage: Firm Leads

At this stage the account manager will have converted many opportunities into a smaller number of firm leads with enough detailed information to prioritise effort for further developing:

Sales Probability 40-70%

Achievement:

You now have significant advantages over the competitors because of:

- Qualification of leads
- Sufficiency of knowledge with proof of customer intentions and ability to act
- Satisfaction potential through understanding of how well your company can satisfy the requirements

Performance:

Measures are:

- Target number of leads with assessed sales probability
- Documented customer intelligence – needs to be online

Warning:

- **Without qualification of leads, account managers will waste effort – don't go after EVERY piece of business that moves**

E-9 Activity: Sell

Now down to business by selling the solution to the client. The focus is each firm lead with a full set of facts, that is:

- Main customer contact
- Other key contacts
- Cope with issues and objectives in the context of the client and sector
- Possible solutions
- Your company's ability to satisfy

There are three sub-activities:

1 Solicit: Push clients into seeing the threats to their business

- Decide on and apply the selling approach by working on the pressure points e.g. urgency, location, cost, skills access
- Identify reasons for outsourcing rather than using own resources
- Get feedback from internal champion in competitive situations
- Test seriousness of intent by outlining a 'broad' solution to obtain customer reaction

2. Charm: interpret clients' concern

- Act according to the clients' basis for decision making, typically founded on confidence, trust (in ability to understand and deliver) and relationship quality
- Work on the worries and nightmares of the customers to fix the role of your company as` a partner
- They are willing you to help them!
- Walk client through your unique selling proposition
- Apply influence – arrange your company executive contact/meeting
- Take clients to a reference account

3: Persuade: to put Clients at the crossroads

- Refer to existing contract parameters
- Prepare the proposal through bid management standards:
- Obey standards
- Use templates
- Deviate in content and style where necessary
- *Build it alongside your client contact 'no surprises'*
- Check appropriateness through a peer review
- Verify resource availability and profit targets
- Obtain approval from the Managing Director, Financial Director and Director of Sales and Marketing
- Be familiar with your own company's selling propositions
- Make you solution unique
- Present solutions in a well practised presentation, ask the Director of Sales and Marketing for professional sales assistance in necessary

Warning:

- The client has 'bared all'. Now is the time to be sensitive and sympathetic with the knowledge
- The signals will be clear - don't ignore them. If the client says a short proposal then that is what it must be - no superfluous padding!
- Avoid giving prices to the client until as late as possible

Sell

<p>Account development tips</p> <p>Adopt distinctive selling approach Have the questions and the answers Test seriousness</p> <p>Walk through USPs Apply the pressure</p> <p>Leverage with customer champion Be professional and unique Fresh, furious, factual and funny</p>	<p>Has it worked?</p> <p>Right numbers of proposals</p> <p>Warning!</p> <p>Be sensitive with the client Respond to the signals Hang loose - especially on price Don't be too proud to ask for help</p>
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Skiing downhill in everybody's interest

E-10 Stage: Nearly sold

At this stage the account manager has presented the case for your company and now has a full understanding of the client's position for this one firm lead. What remains is to overcome the natural inertia and reluctance expressed in objections.

Achievement:

- The delivered results in the customer are:
- A clear proposal
- Information on your company
- Critical mass of influence

Sales Probability 70-90%

The client has the desire for resolution:

- Basis to take decisions
- Conviction that your company is able to help
- In decision-making mode

Performance:

Measures are:

- Target number of proposals

Warning:

- **Organise a visit to a reference account - if the target client agrees the deal is there for closing**
- **Don 't be afraid to get help**
- **Don't be afraid to ask for the business**

E-11 Activity: Respond

Getting to
YES

The account manager has done most of the work. The barriers to the sale are in the personalities and attitudes of the client contacts.

There are three sub-activities:

1 Validate: turn objections into solvable problems

- Confirm the degree of match – supply to needs
- Process amendments precisely as dictated by the client
- Identify objections
- Flex the proposal to satisfy the objections within the constraints of your company capabilities and financial targets

2 Watertight: check expectations and competencies

- Confirm all resource commitments
- Check legalities
- Minimise the risk through careful analysis

3 Close: obtain the business

- Overcome objections with help from sales staff or whoever has the most leverage – which could be inside the client's organisation
- Maintain a 'steady nerve', especially on performance and prices – change the service, NOT the price!
- Watch for buying signals that say the client is ready to deal
- Be confident and do not be afraid to call the clients' bluff
- Have a bid with 'somewhere to go' when negotiations start
- Get the sale with a signature 'on the dotted line'
- Analyse success and failure
- Refer to the original account plan and compare performance – re-plan if appropriate

Warning:

- **This is where it can all go wrong in the final step past the finishing line**
- **Do not accept any prevarication from the client. If the account manager has applied the process with his or her own guile and experience, then the result is a foregone conclusion**
- **The account manager needs a steady nerve here to stay with the detail and not rush through the mass of technicalities**

Respond

Account development tips

Confirm closeness of proposal to needs
Flex to meet objections

Wait for the unexpected
Leave no stone unturned

Get the signature on the dotted line
Failure and success are not far apart

Has it worked?

Target revenue
Activity ratios achieved

Warning!

Push hard
It's now or never
Keep a steady nerve
Who brings home the bacon?

Yes, oh yes, YES!

E-12 Stage: Contract

Sales
Probability
100%

The account Manager has closed the sale.

Achievement:

The account manager can hand over to the project manager, who will be tasked with delivering the contract. Rewards and recognition are made (as determined from time to time).

Performance:

Measures are:

- Signed sales contracts to target revenue and profitability
- Tally of success and failures as set out in the sales pipeline ratios

Warning:

- **Now your company must deliver against the contract as the account manager moves on the next firm lead or repeats the whole cycle.**

From the top

Ask about business goals
 Ask about business issues and current challenges
 Ask about IT plans: what, why, how, who, when
 Ask about how they decide whether to resource a new requirement:
re-training, recruitment, contractors or outsourcing

Offer ideas
 Offer help eg with production of internal business cases
 Offer information, reports, statistics
 Offer introductions

Become a useful contributor of ideas
 Become a consultant to them
 Become an information source
 Become an ally and colleague
 Become a part of their (virtual) management team

The practical implementation of the role

Account Development Checklist

Account Manager:
Client:
Date:

Instructions

Purpose	Use this checklist for reviewing account development best practice in a specific major accounts
Account Size	Use the checklist ONLY for major accounts
Explanation	Answer the questions from a general point of view Do NOT use the checklists to evaluate individual opportunities, leads, etc
Who does it?	Account Managers complete the checklist
Frequency	Present the checklist at regular account reviews, usually every three months
Distribution	Send the checklist to the account development process owner, The Managing Director and the Director, Sales and Marketing
Reference	For definitions and other details, refer to the account development process handbook

Account Development Checklist

Account Manager:
Client:
Date:

Question	Proceed if Yes	See Query if No	Query
Stage: Plan			
Is this an existing account?			This process must not be used for a new client <i>Stop!</i>
Is there an account plan?			Without an approved plan and its prerequisites, success is improbable. <i>Produce a plan.</i>
Activity: Prospect			
Are there specific programmes to bring the account manager and senior consultants in front of client contacts frequently?			Do detailed communications plans. Identify internal champions
Is there sufficient information on the client/business opportunity?			Research the client and the sector and produce formal information
Do you understand the client's business and IT plans?			Get closer to the important people
Does the client come to you for advice on IT Trends?			Establish a close relationship with your internal champion – make your company indispensable and add value
Stage: Opportunities			
Have contacts increased in numbers and quality?			Prospect some more
Is the flow of leads into the sales pipeline going to plan?			Review the prospecting activities

Account Development Checklist

Account Manager:
Client:
Date:

Question	Proceed if Yes	See Query if No	Query
Activity: Capture			
Can you stand up and give a full description of the client's problems and issues?			Improve the quality of contact with the client to elicit insider knowledge
Have you identified areas for rigorous investigation?			Devise campaigns to impress the client and obtain agreement of your company's role
Is your company the supplier of choice?			Review this situation – why not?
Stage: Firm Leads			
Is there the target number of firm leads?			Go back through the process until the target is met
Do the majority of leads have a sales probability of at least 60%?			Talk more to the client until the probability is higher is documented customer intelligence
Activity: Sell			
Does the client articulate worries clearly?			Expose the raw nerves some more
Is the client comfortable with your ability to help?			Obtain commitment to your company
Are the proposals easy to write? If not, you may not have enough information			Work closely with the client champion and get more information

Account Development Checklist

Account Manager:
Client:
Date:

Question	Proceed if Yes	See Query if No	Query
Stage: Nearly Sold			
Is the number of proposals on target?			Get about more in the client's business
Does the client appear ready to take decision most of the time			Re-visit the client's goals
Activity: Respond			
Are there at least three objections on average per proposal? Objections are a sign of intent to purchase!			Go back and test the client's intent
Have proposals generally been unchallenged on legal or commercial grounds?			Verify all legal, performance and financial aspects
Do you believe in the irresistibility of your sales argument?			Discuss with the Director of Sales and Marketing
Stage: Contract			
Are the sales pipeline ratios being met?			Balance the flow through the pipeline
Are you meeting sales targets?			Review all account development activities

Procedure

Cycle

The account development process works in both an annual and continuous cycle:

- ❑ Each year the account manager prepares the account plan for each account and this drives the process itself. Starting levels for opportunities firm leads etc are set.
- ❑ At any moment, the account manager may be executing any activity to improve the flow of opportunities, firm leads and nearly sold contracts. This iteration is an important part of maximising revenue for an existing client.

Roles

The roles are:

- ❑ The Managing Director approves the account plans and receives progress reports
- ❑ The Director of Sales and Marketing provides assistance and advice during the sales process
- ❑ A nominated person owns the process
- ❑ Account managers execute the plans through the process and prepare the progress reports
- ❑ All information accumulated about the client and contacts in the process must be accurately recorded as market intelligence on a Sales and Prospects database
- ❑ Account Managers are responsible for the preparation of reports and any other output, supported by their personal assistant(s)
- ❑ Resource Management is consulted as early as possible – when the probability of closing the sale has passed 75% and the contract is being prepared
- ❑ The Finance Director, who also confirms the legal aspects of the contract, must validate all contracts

Timetable

Frequency	Deliverable
Annually	Performance against previous plans New account plans in line with business plan and budget
Quarterly	Three full reviews <ul style="list-style-type: none"> • Account Review with peers • Formal review with Sales & Marketing Director • Formal review with MD
Monthly	Interim progress reports
Weekly	Informal, internal-to-account reviews

Appendix A

Marketing Plan Outline

1.0 Executive Summary

2.0 Situation Analysis

- 2.1 Market Summary
 - 2.1.1 Demographics
 - 2.1.2 Needs
 - 2.1.3 Trends
 - 2.1.4 Growth
- 2.2 SWOT Analysis
 - 2.2.1 Strengths
 - 2.2.2 Weaknesses
 - 2.2.3 Opportunities
 - 2.2.4 Threats
- 2.3 Competition
- 2.4 Services
- 2.5 Keys to Success
- 2.6 Critical Issues
- 2.7 Historical Results

3.0 Marketing Strategy

- 3.1 Missions
- 3.2 Marketing objectives
- 3.3 Financial Objectives
- 3.4 Target Markets
- 3.5 Positioning
- 3.6 Strategy Pyramids
- 3.7 Marketing Mix
 - 3.7.1 Services offered
 - 3.7.2 Price
 - 3.7.3 Promotion
 - 3.7.4 Service
- 3.8 Marketing research

4.0 Financials

- 4.1 Break even Analysis
- 4.2 Sales Forecast
- 4.3 Expense Forecast
- 4.4 Margins

5.0 Controls

- 5.1 Implementation
- 5.2 Marketing Organisation
- 5.3 Risk Analysis
- 5.4 Contingency Planning

Acknowledgement and hyperlink to
www.bplans.com

Appendix B

Opportunity Evaluation

Opportunity Evaluation

Suggested Grades that might be used in a Marketing Plan are:

1	Lead received
2	Qualified as a Prospect – has budget available and needs services / product that can be supplied within 90 days
3	Requirement formally received
4	Outline proposal made
5	Shortlisted for work
6	Full Proposal made
7	Verbal indication that business has been won
8	Letter of Intent received
9	Contract signed
10	First Invoice sent
0	Business not won

The following Opportunity Evaluation Grid is geared towards Information Technology but can be adjusted to suit other sectors. The weightings within the spreadsheet can also be changed to reflect your own criteria.

Opportunities Evaluation Grid

Prospect		B						B	A * B
Prospect Analysis	A (Weighting)	Open Don't know (0)	2	4	6	8	10	(Score)	
Contacts with prospect to date	2	Not yet to decision maker <input type="checkbox"/>	Only one level <input type="checkbox"/>	Several at one level <input type="checkbox"/>	Two levels <input type="checkbox"/>	More than two levels <input type="checkbox"/>	All levels and people involved <input type="checkbox"/>	#/N/A	#/N/A
Is our contact the decision-maker?	4	No <input type="checkbox"/>	Decision by Others <input type="checkbox"/>	Recommender with some influence <input type="checkbox"/>	With others <input type="checkbox"/>	Chief Recommendation <input type="checkbox"/>	Alone <input type="checkbox"/>	#/N/A	#/N/A
Basis of decision	4	Unknown <input type="checkbox"/>	Some knowledge but unsure <input type="checkbox"/>	Still some factors to establish <input type="checkbox"/>	Established, but not agreed <input type="checkbox"/>	Established and agreed <input type="checkbox"/>	Established, agreed and influence in our favour. <input type="checkbox"/>	#/N/A	#/N/A
Budget	3	Neither planned pending <input type="checkbox"/>	Unknown <input type="checkbox"/>	Planned <input type="checkbox"/>	Approval Pending <input type="checkbox"/>	Approved <input type="checkbox"/>	Signed <input type="checkbox"/>	#/N/A	#/N/A
Is it a competitive situation?	3	Unsure <input type="checkbox"/>	Against Main competitor <input type="checkbox"/>	Against several others <input type="checkbox"/>	Against one other <input type="checkbox"/>	No <input type="checkbox"/>		#/N/A	#/N/A
Have other bidders been used before?	5	Yes <input type="checkbox"/>	Several have <input type="checkbox"/>	One has <input type="checkbox"/>	Unsure <input type="checkbox"/>	No <input type="checkbox"/>		#/N/A	#/N/A
Our Price v Competition	1	Unsure <input type="checkbox"/>	Ours above all competition <input type="checkbox"/>	More expensive than some <input type="checkbox"/>	Equal, or unimportant <input type="checkbox"/>	We are less expensive <input type="checkbox"/>		#/N/A	#/N/A
Timing of proposals (competitive situation)	2	Ours still pending <input type="checkbox"/>	Unknown <input type="checkbox"/>	Competition after us <input type="checkbox"/>	All made together <input type="checkbox"/>	We propose last <input type="checkbox"/>	Ours is the only proposal <input type="checkbox"/>	#/N/A	#/N/A
Timing of Decision	3	2 months before decision <input type="checkbox"/>	Decision date slipping <input type="checkbox"/>	Decision date unknown <input type="checkbox"/>	1 month before decision <input type="checkbox"/>	2 weeks before decision <input type="checkbox"/>	Shortly before final decision <input type="checkbox"/>	#/N/A	#/N/A
Prospects Experience of us	4	Uses us but unhappy (-5) <input type="checkbox"/>	Uses several competitors <input type="checkbox"/>	Uses one competitor <input type="checkbox"/>	Uses competition, but unhappy <input type="checkbox"/>	First time users <input type="checkbox"/>	Our client and happy <input type="checkbox"/>	#/N/A	#/N/A
Prospects opinion of our proposal	2	No idea <input type="checkbox"/>	Unsuitable <input type="checkbox"/>	Incomplete <input type="checkbox"/>	Adequate <input type="checkbox"/>	Satisfactory <input type="checkbox"/>	Outstanding <input type="checkbox"/>	#/N/A	#/N/A
Attitude to us	2	Unknown <input type="checkbox"/>	Negative <input type="checkbox"/>	Biased Against <input type="checkbox"/>	Neutral <input type="checkbox"/>	Positive <input type="checkbox"/>	Fully Confident <input type="checkbox"/>	#/N/A	#/N/A
		FALSE <input type="checkbox"/>	FALSE <input type="checkbox"/>	FALSE <input type="checkbox"/>	FALSE <input type="checkbox"/>	FALSE <input type="checkbox"/>	FALSE <input type="checkbox"/>	0	0
When do we get the business?	3	Unknown <input type="checkbox"/>	In 3 Months <input type="checkbox"/>	In 2 Months <input type="checkbox"/>	In 4 Weeks <input type="checkbox"/>	Next Week <input type="checkbox"/>	Decision Made - <input type="checkbox"/>	#/N/A	#/N/A
Our Experience of the application	2	None <input type="checkbox"/>	Not our usual market <input type="checkbox"/>	Done it once before <input type="checkbox"/>	Done it a few times, but over 3 years ago <input type="checkbox"/>	Current similar work <input type="checkbox"/>	Our bread and butter <input type="checkbox"/>	#/N/A	#/N/A
Technical Development Required	2	Unknown <input type="checkbox"/>	Total Redesign <input type="checkbox"/>	Major Modifications <input type="checkbox"/>	Small Modifications <input type="checkbox"/>	None <input type="checkbox"/>		#/N/A	#/N/A
Confidence confirmed by	4	Won't Visit <input type="checkbox"/>	No Visit <input type="checkbox"/>	Demonstration <input type="checkbox"/>	Factory Visit <input type="checkbox"/>	User Visit <input type="checkbox"/>	Met Top Management <input type="checkbox"/>	#/N/A	#/N/A
							Total	#/N/A	#/N/A

Likelihood of Business Approx Scores 400 = 90%
 300 = 75%
 250 = 60%
 200 = 50%
 150 = 35%
 100 = 25%

28/01/04

Appendix C

Presentation Assessment

Presentation Assessment

Scale 1 –5

(Where 1 is poor and 5 is excellent)

1. ANIMATION

1 2 3 4 5

Face
(smile, eye contact)

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Voice
(articulation, modulation)

--	--	--	--	--

Body
(open gestures from the shoulder)

--	--	--	--	--

Comments:

--

2. BREVITY

1 2 3 4 5

(Concise words and sentences)

--	--	--	--	--

Comments:

--

3. PACE VARIATION

1 2 3 4 5

(vary pace, pitch, pause)

--	--	--	--	--

Comments:

--

4. AUDIENCE INVOLVEMENT

1 2 3 4 5

(provoke reaction during presentation)

--	--	--	--	--

Comments:

--

5. HUMOUR

1 2 3 4 5

(anecdotes, repartees)

--	--	--	--	--

Comments:

--

6. ILLUSTRATIONS

1 2 3 4 5

(Examples of your point of discussion)

--	--	--	--	--

Comments:

--

7. SUBJECT KNOWLEDGE

1 2 3 4 5

--	--	--	--	--

Comments:

--

8. CONFIDENCE

1 2 3 4 5

--	--	--	--	--

Comments:

--

9. OVERALL PRESENTATION

1 2 3 4 5

--	--	--	--	--

Comments:

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