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## **Best Practices for Training Consultants, Services and Technical Professionals to Market, Sell, and Manage Relationships**

### **Everyone Wants To Be A “Solutions” Company ... What Do Your Customers Say?**

It seems like every company across a wide spectrum of industries is positioning themselves as a solutions business. Over the past 2 years, we have interviewed hundreds of C-level executives at Global 1000 companies on their “solution” buying priorities – many of these were either customers or prospects of yours. And we have trained thousands of professionals across a wide variety of services-led; businesses to business industries -- such as software, IT services, professional services, engineering, telecommunications and industrial solutions.

*These customers have told us that most companies who try to market and sell solutions to them are making some profound mistakes – especially when consultants, services professionals and technical experts are integral to the sale.*

**Because in solutions businesses, your people are your value proposition.**

The purpose of this white paper is to:

- 1) Review the customer research on the biggest solutions marketing and selling mistakes
- 2) Summarize the best practices in building the relationship management, solution marketing and selling skills of consultants and technical professionals
- 3) Define the business case for Investing in the “soft” skills training of your company

### **What “C”- Level Executives Think About Solutions Marketing & Selling**

Over the past two years, we have completed thousands of in-depth interviews with C-level executives at Global 1000 companies. The interviews centered on how their critical business priorities were impacting how they buy all forms of IT solutions – including outsourcing, business transformation, systems integration, business process improvement, bundled software & hardware offerings utility computing and infrastructure decisions.

Common patterns and themes emerged – and the impact on your marketing and selling programs could be profound. Here is a brief list of the most important patterns

- **Most solution marketing falls on deaf ears:** Customers are bombarded by solutions marketing – lot’s of it is generic; most of it aimed at problems they don’t see or feel; and promoted by people they don’t know.
- **Customers want you to sell them on what you have already sold them:** With their strategic solution vendors, customers want you to prove the ROI of all the money they already spent on you before they will listen to your new ideas. And your new idea better leverage their past investments.
- **They want to do business with fewer vendors:** Customers want to simplify and streamline their business. They are standardizing everything. Looking to work with people and companies that they have an enduring relationship with.

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- **The decision process is more complex than ever:** Since business and IT are so intertwined, shared decision-making processes abound. Decisions take longer and each decision-maker requires a tailored value proposition. You have to be able to sell both the “C” suite as well as the change agent many levels down who drive most business transformation projects.
- **They value very few “experts”:** When you ask them about the vendors who they see as vital to their business overall and themselves personally – it is always a short list. There is
- **The hurdles to be viewed as an expert are higher than ever:** They care about a quick infusion of hands-on “been there, done that in your business” expertise.
- **Skeptical that the cost of change is worth it:** Most of the changes they make to their business are driven by deteriorating economics and focused on internal operations. Therefore, the cost of NOT changing is higher than the cost OF changing. Vendors often underestimate the value of the status quo to a customer.
- **They want you to share the risk:** They feel better when you have skin in the game and feel that your interests are better aligned with theirs. Also, there is a lot of translation problems when agreeing on performance standards. The same phrasing means some thing different to the vendor than it does to the vendor

### **Biggest Mistakes That Consultants, Services & Technical Professional Make In Relationship Management; Solutions Market and Selling**

We also reviewed specific buying decisions with these executives – and asked them what marketing and selling behavior separated the winner from the also-rans. Here’s the list of the common mistakes:

- **They talk instead of listen:** Too many consultants monopolize their time the time with customers with their banter. The customer never engages and their eyes glaze over. The 80/20 rule applies here. The customer should be doing 80% of the talking.
- **They presume instead of asking questions:** By definition, technical professionals are experts in their field. So, they know all the answers – and tell the customer the solution before they understand the problem.
- **They never find the “pain”:** Customers buy solutions to solve “pain” Like a doctor, your technical professionals have to perform a thorough and quality diagnosis.
- **They do not see the big picture:** Technical professionals can too quickly focus on the immediate project and their product and services. Solutions are always bought in a broader business context. Customers buy from people who know their business best.
- **They look, act and sound like their competition:** The more that your technical professionals play show and tell – the more they sound like everybody else. Research shows that customers qualify the expertise of their service provider based on the quality of the questions they ask – and how well the solution is tailored to their unique requirements.
- **They drink their own Kool-Aid:** Think about the worst sales pitch that somebody made to you. It is likely that they tried to pitch something that you did not want and sold benefits that you did not care about. This is precisely what many people do when selling solutions.
- **They “wing it”:** To deliver solutions, technical professionals rely on step-by-step procedures, performance standards and disciplined quality. But, in relationship management, marketing and selling, they do not use this same discipline and train themselves to succeed.

### **Best Practices in Building the Relationship Management, Solution Marketing and Selling Skills of Technical Professionals and Consultants**

Why do your customer-facing consultants, services and technical professionals make these mis-

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takes? Simply put, they either are not trained – or trained using the wrong methods. Here are the critical best practices you must consider.

- 1) Pursue “Skill-Building” Not Training:** One shot training both doesn’t work and it trivializes the training. You have continuing technical education. So why pursue a limited set of customer facing training. You need a well thought out curriculum related to their role.
- 2) Have Your Clients and Customers Design The Training:** Put customer research and case studies at the foundation of the training. Use real world wins/losses to illustrate the training challenge. Include customer focus groups, interviews or panels to get the attention of the participants. Help your people to see the world – and your relationship – through the eyes of your clients.
- 3) Provide Real World Context and Role Models:** Highlight your top performers in the training. Get them to help teach part of a module – or actively participate. Provide a vivid example of how somebody succeeded by conscious application of the skills.
- 4) Avoid Traditional Sales Training:** Most “solution sales training” is shallow and directed at salespeople. You must accommodate all dimensions of a professionals’ job that impacts a customer – including relationship success factors, finding “pain”, selling your ideas, cross marketing in the context of current work, etc.
- 5) Start Immediately:** Even your most novice people need to know how they can build trust with clients, deliver service, interact with their customer counterparts and listen for pain.
- 6) Accommodate the “Technical Mindset”:** Technicians are not “salespeople”. They are diagnosticians and “craftsmen”. You must show them how they can leverage their core skills as a technician and apply them to their customer-facing role. They do not have to change “who they are”. Instead, leverage their diagnostic skills, methodical nature, questioning and listening skills they already possess.
- 7) Create “Pain” Among the Participants:** People take action and commit to improvement to either avoid or alleviate “pain”. You need to get their attention. So show them how customer relationships can be damaged or lost by doing technically excellent work – but ignoring the interpersonal side. Show them how they have to demonstrate an ability to expand relationships, sell ideas and achieve business advisor status to excel in their careers.
- 8) Make “Qualifying” The Cornerstone of the Training:** Consultants, services professionals and technical experts make two basic mistakes. First, they don’t “win” as much business as they should – this is a “revenue-loser”. Or, they pursue “opportunities” that they have no hope of winning – this a “time and productivity waster”. In both cases, strengthening their qualifying skills is the answer. If you qualify better you: 1) Obtain a in-depth and competitively superior understanding of the opportunity – and position yourself as an “expert” in the eyes of the customer and client. & 2) Identify “early on” in the selling process that an opportunity is not worth pursuing. Both of these skills vastly increase your win rate.
- 9) Teach a Step-By-Step, Methodical Process:** Consultants, services professionals and technical professionals love checklists, methodologies and step-by-step procedures. So, you need to translate their relationship management, selling and marketing role into their language. And give them to tools they can use on a daily basis to thrive.
- 10) Provide Ongoing Reinforcement and Coaching:** Training is useless without some system of ongoing improvement. As part of the training thrust, teach your senior management and more experienced professionals how to coach and reinforce the training concepts in the context of project management, daily work, performance reviews and proposal debriefs.
- 11) Incorporate Training Concepts Into Sales Management Systems:** For training to take root, your professionals need to see that it matters to your senior management, company performance and your perception of their performance. So, build the qualifying criteria into the proposal planning process and sales pipeline analysis. Perform win/loss analysis and use the training concepts to diagnose the root causes of performance and identify

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corrective actions.

### **The Business Case For Investing In Solutions Marketing and Sales Training**

The case is pretty simple and the ROI immediate. First, your customers are your most precious asset. The opportunity cost of a damaged relationship, a lost critical sale are too high or allowing a predatory competitor to supplant you is too high. In addition

- As services become an integral part of your business, then your people become the most important component of your value proposition to customers.
- In many cases, technical professionals have the most contact with your customers; therefore their performance will either make or break your customer relationships.
- Whether they are consultants, engineers, programmers, product specialists, implementation experts, support or research & development -- few technical professionals entered their field so that they could manage customer relationships, market services, sell ideas and convert business. So you need training tailored to their mindset.
- IT companies invest enormous amounts of money in "hard-skills" training for their technical professionals -- making sure that they are current on the latest technologies, product features/functions and implementation methodologies. I thought I'd take the initiative to see if there is a need to invest in the soft skills required to manage relationships and convert business.
- Also, you hire a lot of people right out of school. This is a way for them to be quickly prepared for dealing with clients.

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## Appendix: SAGE Training Modules

Training works best when it is fully customized to your business, piloted and then rolled out. Customize the training by interviewing your leadership team, meeting with current top producers, understanding practical relationship and selling scenarios and finding ways to link the training into current marketing thrusts or live accounts. If needed, perform customer research and win/loss analysis to buttress the learning.

Deliver it in the combined manner that benefits you most, including 1) in-house 2) web-seminar 3) e-learning or 4) train the trainer basis. Leverage the core training programs that have been proven to work Examples are:

**Client Relationship Management:** See your service through the eyes of your clients, quantify the quality of your top relationships and leverage proven best practices for creating world class client relationships. Understand what clients don't care about that you do. Review the traps and triggers that cause clients to undervalue you -- or leave.

**Diagnosing A Customer's "Pain":** Learn to be a business doctor (not a sales person). Leverage your existing professional skills. Use listening based systems to best understand a customer's needs. Review specific questioning strategies. Create specific scenarios to identify the customer's business priorities and how they drove the need for your solutions.

**Systematic Selling For Technical Professionals:** In their technical work, most professionals rely on step by step procedures, checklists, and process discipline. Yet, when it comes down to relationship management and selling -- many simply wing it. Instead, we bring the same systematic discipline to relationship management and selling.

**Selling Your Ideas:** As technicians, many sell the things THEY value rather than what a customer desires. Learn to position your ideas in a way the client values. Sell into their pain.

**Building Your Network Within Top Accounts:** The more loyal and valued relationships that you build in an account -- the more vital, secure and enduring the relationship. Best practices reveal that building a web of relationships across all levels -- for senior decision-makers to the most junior person on the implementation team -- is essential.

**Proposing and Selling:** Translate the customer's "pain" into a solution. Link the project scope and approach to their "pain" Make the business case in terms they value. Tell them how to sell other senior decision-makers within their company.

**Positioning Yourself As A Valued Business Advisor:** Demonstrates how to incrementally build your reputation in your top accounts and eventually with prospective clients.

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