



**PRO-EXEC**

**Selling Skills Assessment Tool  
and  
Customer Focused Selling**

## Key Questions

- Are your sales in line with budget?
- Are your top line sales growing beyond market expectations?
- Are you confident you can sustain expected growth?
- Are you leveraging the full sales potential?
- Are you confident that your sales teams are motivated to achieve beyond expectations?
- Do you have a reliable, predictable process to deliver expectations?
- How certain are you of the future delivery of the sales teams?
- You're ready to take sales to the next level – How are you going to get there?

## What is selling?

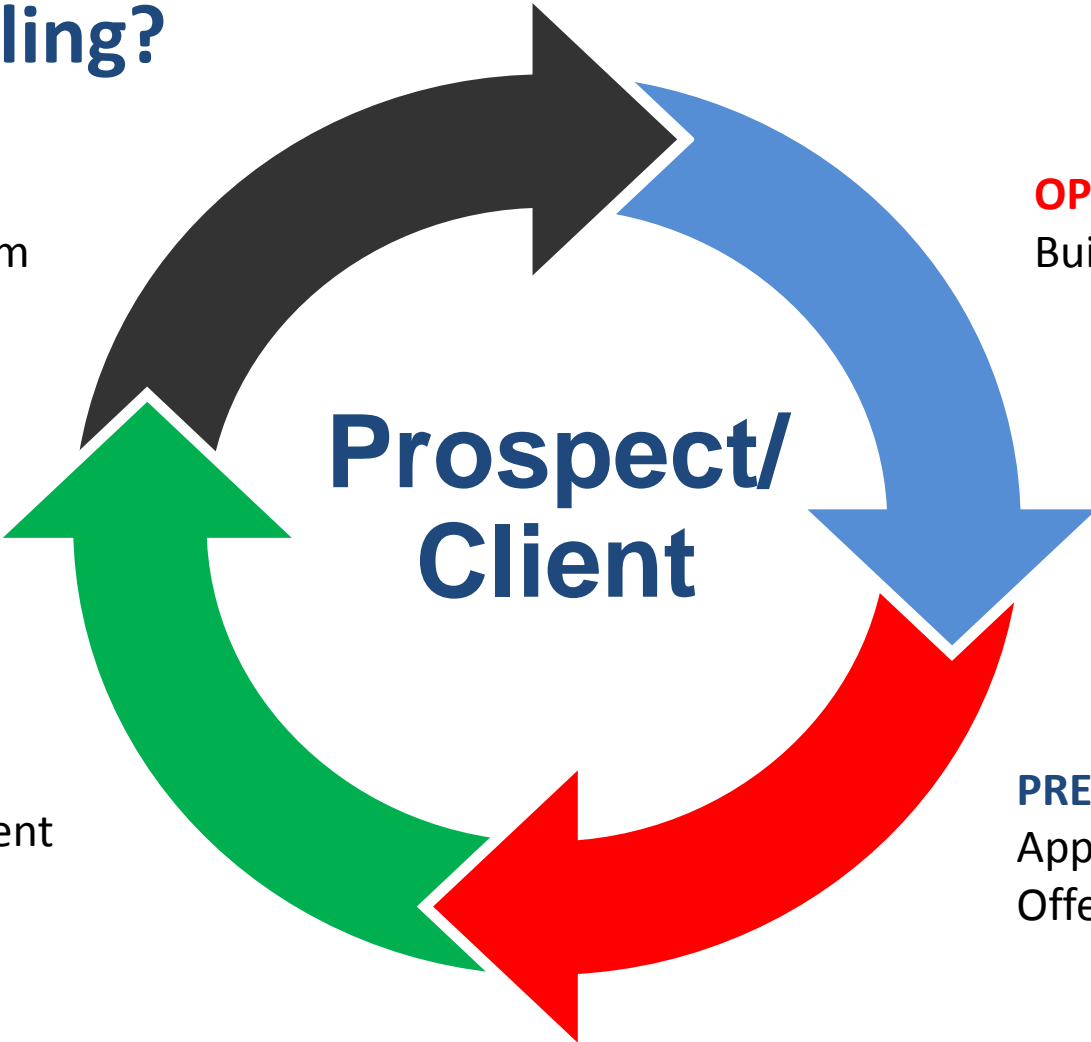
**POSITION**  
Build Long-term Relationships

**OPEN**  
Build Trust & Credibility

**INVESTIGATE**  
Identify the Motivating Buying Factor

**PRESENT**  
Apply Judgment & Offer Solutions

**CONFIRM**  
Gain Agreement



## Unique two-step selling approach

- **Selling Skills Assessment Tool (SSAT)** - SSAT provides accurate statistical data that mirrors your organisational structure, and lets you see exactly where you are today – individual, team and company-wide strengths and area for growth.
- **Customer-Focused Selling (CFS)** - CFS delivers the training your team needs to perform at the highest level. Based on the information we learn in the SSAT, together with an understanding of your specific goals, we're able to target an instructor-led or in-house program to produce the immediate improvement you're looking for.

## Step 1: Selling Skills Assessment Tool (SSAT)

- SSAT is an online questionnaire that probes your sales people's abilities in the Five-Step CFS process. It takes about half an hour to complete.
- SSAT is a tool designed to assess sales professionals' consultative and customer-focused selling skills. It is a thorough statistical analysis of sales individuals, your sales force and their specific groups, irrespective of age, gender or race.
- It primarily serves as a diagnostic, benchmarking and tracking tool which facilitates targeted training in the Five-Step CFS Process.
- SSAT gives you an objective look at your people's strengths, their skills, and specific areas that need improvement. It provides a detailed, accurate quantification of the selling abilities across your organisation.
- It provides vital information that allows you to focus your sales training initiative for maximum impact and maximum revenue growth.

## SSAT Corroboration

- SSAT is a diagnostic tool designed to provide insight into your sales skill strengths and areas of growth. It turns a qualitative evaluation into a quantitative resource.
- Developed in 2001 by Nancy Stephens, MEd & founder of Global Sales Alliance; acquired by PI Worldwide in 2006
- Beta tested for 6 months; 10 companies; sample size of 300
- Two independent research studies in 2003 and 2006 by doctoral-level psychologists indicate all individual items and overall SSAT scale show good reliability
- SSAT tracks demographic and sales experience data for every participant
- SSAT scores not impacted by age, gender, race, or sales experience
- SSAT utilizes centralized processing and SPSS (highest caliber statistical software) for quality assurance
- Administered to thousands of participants in North America, Europe, the Middle East, and Asia
- Available in a broad range of versions by industry and position



# PRO-EXEC

## Individual Results

	Open	Investigate	Present	Confirm	Position	Correct Total #	Total Correct
Rep Name	4.0	4.0	4.0	3.0	3.0	18.0	72.0%
Group Name	3.0	2.5	4.0	2.5	2.5	14.5	58.0%
All Participant Summary	3.7	3.6	3.8	3.7	3.8	18.6	74.6%

## Reflection Guide

(68% Optimum)

**Results in Line with Your Expectations:**

**Surprises You See in the Data:**

**Potential Explanation of Surprises:**

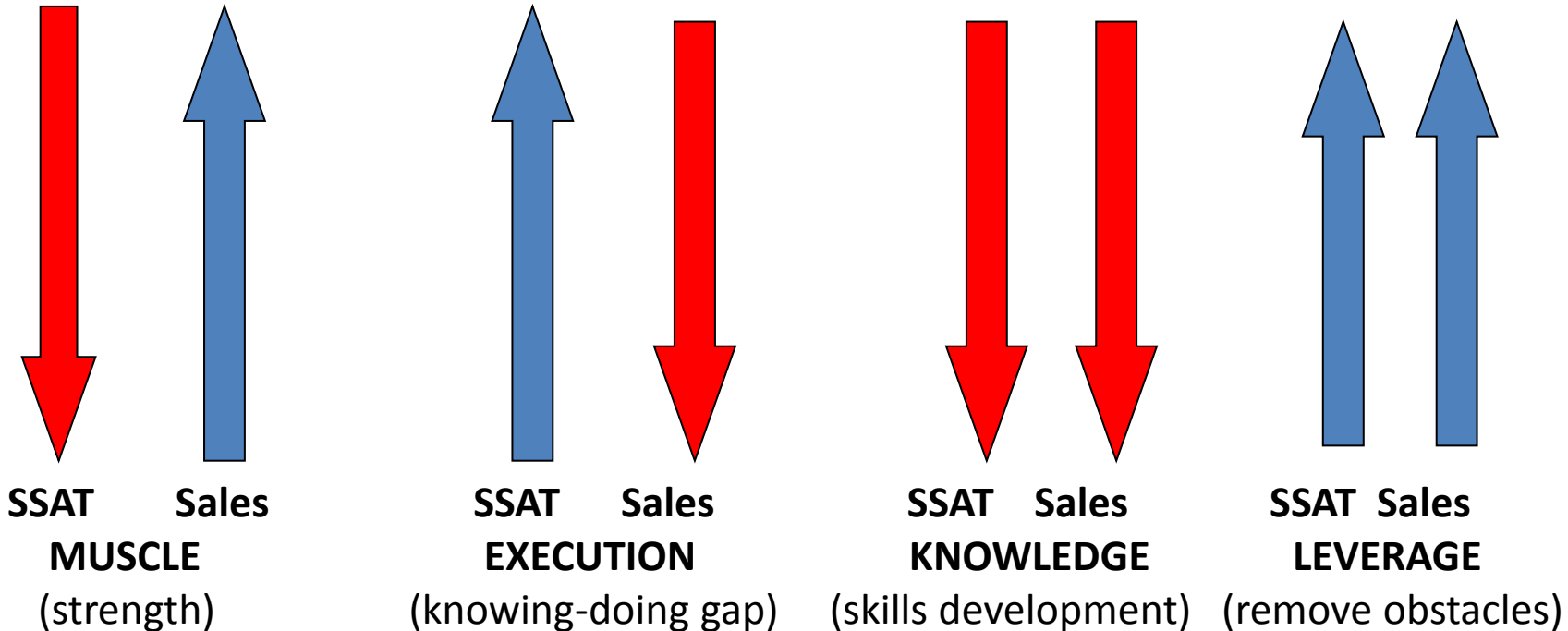
**Actions:**

Each of your team members gets an individual profile which determines how to develop them.



# PRO-EXEC

## SSAT Diagnostic Tool: Sales Volume Relationship



## Step 2: Customer Focused Selling

- Today's competitive market demands that you and your sales people are on top of their game, with excellent sales skills and customer relationship management.
- Customer-Focused Selling is designed to provide sales teams with the knowledge and skills required to sell effectively and to consistently achieve and sustain top sales results. It is a disciplined and structured approach to selling.
- It is the single most effective way to improve individual performance, increase productivity, create predictable and sustainable sales results and helps your people grow professionally.
- CFS is designed for all sales professionals - the well seasoned, experienced sales person will discover a new approaches and up-grade their skills. Those with less experience will gain from the sound, tried and tested techniques taught in the programme. It is an interactive program that targets the core competencies needed for effective consultative selling.

## Pre CFS Participant Interview

Participants are invited, in one-on-one interviews, to discuss issues that promote or hinder their ability to sell. Questions loosely based on SWOT analysis and Porter's five forces of competitive positioning. The feedback is introduced into the course in order to seek a collective solution

### Objectives and benefits

- Interviews are confidential
- Explore issues that would otherwise not be raised
- Bring to light issues that may be easily solved
- Raise issues that are extraneous to the selling process but can be discussed and solved
- Can introduce positive factors that can be leveraged by/ to the group

## Five-Step CFS Process

- **OPEN:** Explores how to build trust and credibility by setting verbal and written agendas, handling early objections and managing client expectations.
- **INVESTIGATE:** Examines how to accurately assess the situation and uncover the client's needs through strategic questioning, listening skills and the examination of their decision-making criteria.
- **PRESENT:** Encompasses how to link your capabilities to the client situation through strategic value articulation, differentiation and the appropriateness of your solutions.
- **CONFIRM:** Uncovers how to ask for the business, handle objections, gain agreement and win the business, even when there are multiple decision makers.
- **POSITION:** Focuses on how to build long-term customers for life, including referral strategies, cross selling and customer relationship management.

## Customer Focused Selling Objectives

- How to build trust and credibility
- How to adapt to social styles
- How to sell to multiple buyers
- How to identify decision makers
- How to uncover needs accurately
- How to utilise strategic questioning
- How to master business listening
- How to articulate value
- How to ask for the business
- How to gain agreement
- How to handle objections
- How to position for long-term business

## The Selling Environment

**Overview:** Customer-Focused Selling is about selling from the **Client's** perspective:  
To acquire new prospects/clients and to grow the prospect/client into a long-term relationship.

**Objective:** Discuss the concepts presented by the **Effort/Results Matrix**. Explain the difference between your world and the prospect/client world. Describe the five steps in the Customer-Focused Selling process.

**Course summary:** Selling from the viewpoint of the prospect's/client's world is more effective than the way most sales professionals typically approach to selling. Customer-Focused Selling is a consultative process that can be divided into five distinct steps: Open, Investigate, Present, Confirm, and Position.

## Open: Building Trust and Credibility

**Overview:** Building a relationship, understanding decision-making, alignment and consistency, effecting transition to the next step.

**Objective:** To use the verbal agenda, describe the **four key Social Styles**, demonstrate adapting communication in customer conversations, list the social needs of a contact based on Social Styles, explain the impact of verbal, vocal, and visual modes. Plan sales calls carefully in advance and know the objective for each call.

**Summary:** Identifying and adapting to the prospect's/client's Social Style builds trust and credibility. The four Social Styles are: Controller, Expresser, Cooperator, and Analyzer. Consistency in communication and maintenance of credibility, remember that only 7% of the impact of communication is verbal. The remaining impact consists of 38% vocal and 55% visual. Use a verbal agenda to transition to the Investigate step.

### Investigate: Identifying Decision-Making Motivation

**Overview:** Don't start presenting before you have enough information about the prospect's/client's world. You won't get the results you want because the prospect/client can't make sense of it in their world. Get more information before you start to present: **Investigate!**

**Objective:** To Describe the 3 types of questions used with decision-makers, demonstrate use of Investigative questioning techniques, design effective questions, explain the difference between intent and impact, demonstrate effective listening, provide a verbal summary.

**Summary:** Use Investigative questions (SWOT) in addition to Closed-Ended and Open-Ended Questions to get more useful information. Use questions that begin with Explain, Share, Tell, Explore, Describe, Give, Help Me Understand rather than **“why”**, you are measured by impact, not intent. poor habits interfere with effective listening: private planning, prejudging, premature dismissing, Selective listening, private rehearsing (Clients remember **experience** of questions rather than **actual** questions). Provide a Verbal Summary and prepare them to hear your solution.

## Present: Articulating Value

**Overview:** Many sales professionals waste time talking about things that aren't important to moving the sales process forward, make a targeted presentation to the prospect/client at the right time to advance the sale and generate long-term partners.

**Objective:** To present your solutions effectively over the phone and in person by:  
Identify solution attributes, map attributes to value for the prospect/client  
Describe solutions in terms of value. List the three types of presentations, present effective solutions based on the prospect/client needs. Meet Social Styles needs of decision-makers during presentations.

**Summary:** Rather than focus on facts, figures, benefits, and budgets of your solution, identify the **underlying value** that those attributes represent.  
Present from the prospect's/client's world and link back to your solution's specific attributes.  
Take Social Styles into account when you present.

### Confirm: Gaining Agreement

**Overview:** In a conventional selling approach “Closing the sale” and in a consultative selling approach “Continuing the process and establishing next steps”

**Objective:** How to present your solutions effectively over the phone and in person by describing four ways to ask for a decision, apply Social Styles to the prospect/client decision-making process, explain the difference between conditions and objections, interpret objections by using the “requests” strategy, demonstrate the process for objection-handling and answer objections effectively and solve prospect/client problems.

**Summary:** It is helpful to think of this step as “continuing the process and establishing next steps” rather than “closing the sale.” There are several methods of “asking for a decision.” These include Direct question, timeline/time-driven, direct statement, and process-driven/next steps. Find the method that fits your style and use it. Learn to be comfortable with other methods since this gives you better flexibility. Objection handling is a step-by-step process: listen, acknowledge/empathize, ask questions, summarize, answer the request, confirm agreement.

### Position: Building Long-term Relationships

**Overview:** “Rule of Five”. Getting additional business and ensuring new opportunities, maintaining access to decision-makers, gaining referrals, keeping competition from gaining, add a positive client reference

**Objective:** To help build long-term relationships with clients, grow business, and generate sustainable new business results by:

- Explaining the application of Plan-Do-Check-Act cycle to client relationships, obtain referrals from clients to develop additional new business
- Network effectively to leverage the account relationship, apply the “Five Alive” technique for networking
- Describe a client growth account strategy

**Summary:** Building business for the long-term consists of: maintaining quality using the PDCA cycle, networking and obtaining referrals, creating five positive impressions using “Five Alive,” and creating and managing an Account Growth Plan to guide your development of the account.

## Training Options

- 1 Day – includes the full CFS curriculum
- 1 ½ Days – includes the full CFS curriculum, plus the Video Learning Lab
- 2 Days – includes the full CFS curriculum, with additional practice scenarios and a ‘deeper dive’ into the core elements of consultative selling

## How Can We Help?

- Questions
- Comments
- Next Steps

## Bio

**Nick Langman has a BA (Hons) degree in Economics and a MSc in Finance from Cass Business School.**

**Nick spent eighteen years in the City as a senior institutional salesman, sales manager and managing director specialising in high margin and structured products. He worked at institutions such as Merrill Lynch for eight years and Deutsche Bank for four years.**

**He spent four years in Asia as Senior Vice President and Regional Head of Fixed income Sales and has great experience in selling complex products into, and managing, different cultures**

**Nick established Pro-Exec Limited ([www.pro-exec.co.uk](http://www.pro-exec.co.uk)) in March 2006 as a sales consultancy in order to share his extensive experience in business development, sales and sales management.**

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