Sales and Service Excellence

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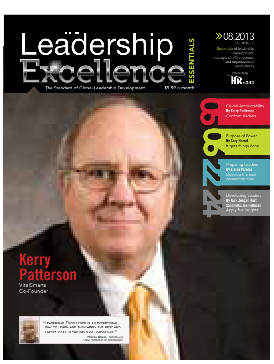

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7 Negotiating Mistakes

Avoid to maximize bargaining prowess

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Features

Sales persons face myriads of challenges, from several fronts -- organization, customer, market, etc. They are bound to perform within rules and regulations; even at the cost of losing customers, they have to deal with Baby Boomers; whose behavior and expectations are wide apart from that of Millennials, and their competitors are becoming aggressive with each day; leaving no stone unturned in a bid to attract customers. While it is certainly very difficult to win over all these impediments, it is not impossible either. This issue of our Sales and Service Excellence Essentials tries to find answers to some of your daunting problems.

A negotiation process is a lot like a chess game; one careless, short-sighted, and ill-conceived move, and your chance of losing a deal is very high. Not to mention the perilous consequences it can lead you to. Our cover story *7 Negotiating Mistakes* by Eldonna Lewis-Fernandez points out why every single move in a negotiation process has to be thoughtfully considered and made one at a time. Eldonna lists down the most common negotiation mistakes that need to be avoided in order to maximize bargaining prowess -- both in business and in life.

Whether you intend to or not, sales persons always create a position in the minds of customers and this position influence the latter's attitudes toward you, as well as the buying decision that follows. Dave Kahle in his article *Position with Power* underlines the importance of creating a positive position in the minds of customers because the position a sales person occupies is a complex intertwining of the perception of a company, its solutions, as well as a person. It is up to the sales person whether you want to position yourself in customers' mind the equivalent of 'Taurus', or you'd want them to think of you as a 'Lamborghini'.

'All of us are buyers', however, not everybody can be an effective sales person, notes Jeremy Francis in his write-up, *Can Anybody Sell...?* While most sales persons lack common sense and empathy with buyers, many also lack an understanding of the buying process. Jeremy outlines seven simple rules to help one become an effective sales person, who helps buyers 'to buy, rather than sold to'.

Does your company's policies and procedures restrict you from offering good and fast customer service? Have you ever felt like breaking or at least bending them for the sake of customers and just so that you don't lose them to competitors? Fret not. A little bit of bending is acceptable. *Bending the Rules* is yet another gripping read from John Tschohl that we have in this issue. Here he emphasizes on the importance of giving 'employees the power to make decisions on the spot because one policy can't cover everything'. So, 'Happy bending'; after all, it is not a criminal offense. And, if you can get lifetime of goodwill and customer loyalty for less than $50, then why not!

Hope you have a great time reading this issue

Happy reading!

Regards,
Debbie McGrath
HR.com

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7 Negotiating Mistakes

Avoid to maximize bargaining prowess

By Eldonna Lewis-Fernandez

While even the word 'negotiation' can evoke fear, stress and anxiety for many, the intent is quite simple; to discuss and ultimately agree on a deal. Whether it's a multimillion dollar contract or just deciding where to meet for lunch, life is rife with negotiations. And, the negotiation process is a lot like a chess game where strategy reigns supreme -- one thoughtfully considered move at a time. Make a careless, short-sighted, and ill-conceived move and suffer the perilous consequences.

Even when faced with the most daunting of deals, regarding the act of negotiation as a 'game' may alleviate the apprehension and give you the confidence to make power plays that will ultimately facilitate your desired result. Unlike strategy games like chess, however, the most effective deals are a win-win proposition for all parties rather than a winner-loser result.

To help individuals maximize their bargaining prowess in business and in life, below are the seven most common mistakes that are made during a negotiation:

1. Lacking Confidence

Many people think they need to show a certain kind of confidence, like being loud, bold or brazen, to successfully negotiate a deal. Others think that a lot of experience is required to be a good negotiator. Most of the time, it merely takes tenacity and good old preparation to ensure you are aptly equipped to assert mutually desirable terms, anticipate objections, and discern what are the motivators or 'hot buttons' that will resonate with your opponent.

Projecting confidence also means having heart, which is endearing to others whether or not you have years of negotiation experience. This can also result in the opposition having a less defensive stance, and making them more amenable to your stipulations. Without projecting a notable level of confidence, and backing that up with solid, well-researched information, failure will surely prevail.

2. Thinking something is Non-negotiable

When you think like a negotiator, everything is negotiable! It's a mindset you have to operate from in order to become not just a good negotiator, but a great one. When you decide that the terms for anything can be changed in your favor, a world of opportunity presents in itself. Of course, as with most things in life, there will be rules to adhere to with each deal on the table, which are needed to evade chaos and keep discussions on track. However, even rules are negotiable! They can be modified if you simply propose an ethical, viable and mutually beneficial alternative solution. Powerful negotiators are rule breakers!

3. **Not Building Relationships First**

This is probably one of the biggest mistakes individuals make with regards to negotiation and in business in general. Perhaps you have attended the standard 'networking' event where you exchange dozens of cards without having a real conversation with anyone. It's time to slow down and start making real connections with people -- particularly those you might be involved in a deal with later on.

Find out something about them and their lives. Get personal. Much useful information can be gleaned during casual conversation, including what they value in life, what motivates them, what annoys them, their ethics, etc. Find out something about them, personally, and not just their business. You might be surprised how well you can leverage what you learn through a genuine conversation with someone.

4. **Not Asking for What You Want**

There is one key truth in negotiations; you must ask for what you want. Sounds simple enough, but in practice it can often be daunting. People naturally fear rejection or were taught not to be 'greedy' as children, so we instinctually refrain from asking for things in life. However, in business, rejection is never personal -- it's merely a reflection that you did not present a viable argument substantiating why you should get what you want. It's the offer that is being rejected, not you, so keep emotions in check and re-calibrate your approach. 'No' often just reflects a need for more information, and take heart in knowing that people say no an average of three times before they say 'yes'.

It is important to understand that if you don't ask you don't get and the only way to master the art of rejection is to get rejected and keep asking. When negotiating, make it a priority to ask for exactly what you want. Most of the time, you will either receive what you want or an acceptable alternative.

5. **Talking too Much**

Talking too much is a sure-fire way to kill a deal. Have you ever been offered a product or service, and the salesperson kept talking until he or she talked you right out of the purchase? If they would have simply asked for the sale and stopped talking, their chance of success would have increased significantly. Never underestimate the power of silence. There's an old adage that says 'he or she who speaks next loses'.

When discussing a deal, if you simply stop talking and get comfortable with the awkwardness of silence, your ability to win your argument, sell the product, or a get concession in the negotiation increases significantly.

6. **Not Documenting**

The importance of getting the final agreement in writing cannot be stressed enough. Even better, consult with a contracts attorney to review contractual documents or any that require a signature. The purpose of a written agreement or contract is to provide protection for both sides and alleviate any ambiguity of terms. A myriad of problems can occur when the terms of a deal are not put in writing because what you 'think' the other party said and what they 'think' you said can be two different things. Documenting the agreement eliminates such 'perception' problems and protects the interests of all parties involved.

7. **Signing without Reading**

Before you sign on the dotted lines, it's imperative you read what you are signing -- no matter how large of a packet it entails. Modern life is fast-paced and people are usually engaged in multiple things at once, making it difficult to focus and causing some to sign legal documents without reading them first. The result can be nothing short of disastrous. Make sure you read any agreement or contract in full, to ensure you are not confirming terms you will regret and cannot undo, which can cause copious problems in future.

Whether you are a seasoned negotiator or avoid wheeling and dealing with people altogether, you will vastly improve your results and be motivated to 'get in the game' by knowing how to avoid these prime pitfalls. Whether seeking to gain advantages in your business or personal life, the art of 'thinking like a negotiator' will profoundly impact your ability to actualize your desired outcome. **SSE**

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Overcome 'Opportunity Blindness'

3 keys to personal and professional success

By Marty Jacknis

Success. For some people it just seems to come naturally. Intuitively, these individuals plan better and communicate more effectively. Instinctively, they identify opportunities that others miss, striking when the iron is the hottest and reaching their goals in record time. But chances are these impressive achievements have little to do with inborn abilities. What truly sets these top performers apart is the ability to seek, see, seize and leverage vast number of opportunities surrounding them at any given time.

Unfortunately, most individuals are either unaware of this basic concept, or, they are constrained by self-limiting beliefs and planning systems that keep them from stepping out of their comfort zones into their 'opportunity zones'. In either case, like individuals wearing glasses with the wrong prescription, they have a limited view of what's really out there, leaving golden opportunities behind, only to be revealed in hindsight.

In undershooting potential business building and life-enhancing situations, too many people are leaving massive untapped and unleveraged opportunity on the table. But there is a cure for this 'opportunity blindness'. By utilizing a universal planning and communication methodology called MPV, anyone can increase the probability of gaining a greater return from most any action and or initiative. Even top performers can go from unplanned and intuitive successes to more intentional and consistent triumphs.

The Power of Three

MPV stands for the range of outcomes and correlating success identified in three levels of objectives: minimum, primary, and visionary. These three levels effectively 'bracket' the range of desired results. Together they are like progressive 'opportunity' lenses that facilitate vision at multiple perspectives and bring many successes and opportunities within sight.

1. Minimum objectives *(M)* are the most attainable objectives, the bare minimum of what must be achieved to make an encounter and initiative worthwhile. For example, the minimum objective in writing an article such as this would be to clearly introduce this concept to as many professionals as possible.

2. Primary objectives *(P)* are the reasonable objectives that should be achieved in the course of a call, meeting or initiative. Often primary objectives are the sole objectives formulated, leaving the initiator with only one way to gauge success or failure. Primary objectives answer the question, "What reasonable, desirable outcome of this interaction would I need in order to consider it a success?" The primary objective in writing this article is to motivate readers to try the concept and gain value from its use.

3. Visionary objectives *(V)* are the most aggressive objectives that could be achieved in the course of an encounter. This is the level where top performers shine the brightest. Taking this additional step, they are able to identify objectives with the most significant and greatest possible outcomes. The visionary objective of writing this article is to have the reader embrace and continuously utilize the concept of removing opportunity blinders and then sharing it with their team members, associates, customers and loved ones.

Utilizing MPV

MPV is simple yet important. MPV can be applied to any facet of one's business or personal life. It can be used to guide everything from how long to let the phone ring (minimum answer by three rings, primary two rings and visionary one ring) before answering to quantifying manufacturing outputs, identifying sales goals, setting quality parameters, establishing meeting objectives or creating budgets.

So, why doesn't everyone take advantage of this approach? The answer has its roots in lack of awareness. Most people have never considered the impact of their self-limiting beliefs. Some don't have a desire to improve; for others a fear of failure and rejection holds them back. Still others, believing that all rules are absolute and finite, refrain from asking questions that could increase their chances to optimize every situation.

Yet, when it comes to most 'rules', few are actually set in stone. In fact, there is built-in flexibility in almost every business model to accommodate requests. So, whether inquiring if a hotel can upgrade accommodations or asking clients to increase the size of their orders, all encounters and activities have the potential to become more productive. The greater the opportunity, the more thought and time that need to go into the planning.

How to implement

Adopting MPV as a tool doesn't require a lengthy implementation or even any financial investment. As simple as getting in the habit of wearing glasses, it can be integrated into everyday life and business practices. It begins by asking three basic questions.

1. What would be reasonable minimum, primary and visionary objectives for this encounter?

2. What information must be given and obtained in order to achieve the desired minimum, primary and visionary objectives?

3. What are the logical and commonly expressed reasonable objections most likely to be encountered in trying to achieve the minimum, primary and visionary objectives?

However, effectively changing behavior goes beyond a series of questions. Human nature dictates that buying into anything new requires not only a strong stimulus, but the ability to recognize there is a void in or a problem with a current process. Overall, there needs to be an understanding of the implications, both positive and negative, of making a change.

Demonstrating the benefits of MPV can be accomplished easily through a sales call or role-playing training exercise. Experience has shown that in almost every case after the exercise is completed, most individuals were amazed and realized that they had a self-limiting plan at best. And with proactive introspection they clearly saw their current thinking and planning voids as well as a simple solution. At the end of the exercise it is important to ask all participants to think back to what their strategies were prior to the exercise. Did they develop a plan or wing it? Could they have accomplished more if they had established clear multiple objectives? Had they considered what other opportunities were possible from this one situation? How would this exercise been different using MPV?

As a follow up to this exercise and prior to future encounters, conduct 'vision checks' by meeting staff to assess whether the three-question format is being utilized.

For Scott Davis, CEO of TRA Insurance Solutions, this is an essential part of the MPV process. "When I was exposed to MPV I realized that I would gain more from my sales people if I spent more time reviewing their appointments and having a conversation -- a dry run so to speak -- before they had an appointment," says Davis, who believes that MPV added structure to what he did unconsciously and intuitively but realizes it is a learned process for many.

Brett Lindquist, CEO of The Mortgage Firm says his company is currently implementing MPV as part of the company culture. "MPV is a goal setting plan for an appointment that makes you think and plan ahead of time," says Lindquist. "With MPV, you have your objectives in mind and you ask questions differently because you are thinking of the bigger picture and a broader perspective."

The Benefits

Whether MPV is used with strategic, tactical, operational or personal initiatives, the myriad of benefits exceed traditional limited planning methodologies and their planned outcomes. The MPV model:

- Encourages introspection and analysis of the range of possible outcomes from an encounter. The process challenges baseline assumptions, making encounter preparations more robust and more likely to garner success.
- Fosters understanding and alignment amongst meeting participants. Establishing shared MPV objectives requires communication about underlying assumptions.
- Promotes communication of information and creates a forum for knowledge transfer. Achieving any level of the objectives requires the dissemination of information to address obstacles and objections. By identifying the minimum, primary and visionary objectives, the degree of information required to attain each will be readily apparent.
- Inspires individuals and teams members to aim higher in their business objectives. In this way, the organization as a whole benefits.
- Increases the probability of reaping value from every business encounter and also reduces failure from business cycles. This, in turn, alleviates stress, which has additional benefits to the individuals and the larger organization.

Blinders Off

Though hindsight is 20/20, everyone is subject to opportunity blindness before events unfold. While the future cannot be foretold, likely outcomes can be anticipated and planned for with the right tools. MPV is an important one when it comes to opportunity maximization. Yes, it takes time, and practice to develop, but before long by establishing multi-layered objectives, success is more readily recognized and the results can be life changing. There is simply no reason to remain blind to opportunity any longer. Try utilizing the MPV approach on your next significant initiative. That action and its associated insights and results will probably change how you plan and communicate for the rest of your life. Although, be forewarned. By utilizing progressive opportunity lenses from now on, the future will be so bright that opportunity sunglasses might prove necessary. **SSE**

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Boost Brand behind Microphone

Five public speaking fundamentals

By Scott Topper

As he approached the podium, Taylor could feel his face begin to redden and perspiration building on his palms. He mentally recited his opening line with each step to center-stage, hoping above all else that he would not stumble over his words, or worse, draw a complete blank.

His business was still in its infancy -- it had been less than 18 months since he officially opened the doors -- but the immediate dent he aimed to make in his market was more like a surface-scratch, and it became blindingly apparent that new avenues must be explored to expand his brand and increase company-wide profitability. He shook off the looming nerves, adjusted the microphone and began to speak.

Many business owners can identify with Taylor's anxiety and apprehension, as the stage is leagues away from the comfort-zone of a boardroom. Addressing a crowd of contemporaries is vastly different from delivering a presentation to a small group of colleagues, but nevertheless, speeches are one of the premiere channels for brand construction, and public speaking prowess is a rubber-stamp to your status as a thought-leader in your field.

There's an inaccurate belief in business that only professional speakers should talk publicly. The truth is that only a small number of people who are actively speaking at local events, conferences and meetings are professional speakers. Most of them do it for product and service promotion or expanded visibility for themselves or their brand. When you employ these five fundamentals, you can become a great public speaker and learn to market yourself successfully.

1. Assess Your Skills and Knowledge

The first thing you should do is to assess your skills and abilities. Are there any topics that you're an expert on? Let's say you're passionate about healthy eating and fitness. You could use your knowledge to help people understand the importance of good nutrition. Write engaging speeches about organic food and its benefits or talk about the role of physical activity in disease prevention. Show people how they can lose weight without starving themselves or spending a fortune on supplements. Just think about how many topics you could cover in your speeches!

If you're a business professional, you can talk about the most effective marketing techniques and help people improve their lives. Show them how to start a business, attract more customers, and promote their products more effectively. If you're a blogger, you can host webinars and teach your audience about Internet marketing. Regardless of your field, you can use your skills to educate and inform people -- and create a steady income, as well.

2. Create Your Statement and Share Your Story

Your primary goal when delivering a speech is to engage the audience with a dynamic message that creates value and resonates in their minds. Create a clear statement of what you do and how you can help customers.

If you want to grow your business, focus on shaping a successful brand that tells your story and inspires people to take action, and craft a presentation that imparts your values and ideals on your audience. The most influential speakers have something special to say; they speak from personal experience and share real life stories that engage and motivate people. Personal stories are easy to relate to and have the greatest impact on your audience. If you want to become a good speaker, come up with something new -- make the mundane interesting. Encourage your audience to see things from a new perspective.

3. Rehearse, Practice and Scrutinize

As the old adage goes, 'Practice makes perfect', and this is especially true when building your business and reputation through public speaking. Scrutinizing each and every aspect of your speech, committing it to memory and rehearsing in front of a small group of people will help allay pre-performance anxieties.

Public speaking can be a risky business. Drawing a blank, failing to engage the audience or forgetting a line is entirely possible while onstage, but with constant practice, you diminish the risk of all of them. It's important to understand that starting a public speaking business requires hard work and commitment. Anyone can become a good speaker with persistent practice, but this doesn't mean it's easy.

4. Contact Local and National Associations

When all of the legwork involving crafting an insightful, engaging speech is complete, you need to find your audience. Many neophytes in the speaking world are confounded regarding the ins-and-outs of securing engagements, but it can be as simple as marketing yourself and your presentation to your target market.

As a business owner, you need to contact local and national organizations in your area of expertise and tell them you're looking for speaking engagements. Search for business events where you could talk about your products and services. Depending on your niche, you can go to schools, colleges, libraries and social clubs to make informative speeches. Tell them about your business and ask for permission to hold a speech. Find a way to tie your message to theirs to maximize your opportunities.

5. Get the Audience Involved

Inviting your audience to be active participants in your performance is one of the best ways to ensure engagement and connection. Encourage questions and sharing of ideas -- create a dialogue. Ask people to stand up, group themselves, and share one or two things they found useful in your presentation. Tell them why you enjoy speaking about this topic and how your speech can help them.

The audience was abuzz, and Taylor was elated -- a combination of relief from conquering a fear and the knowledge that his performance was the first-step in elevating his brand and business.

Follow Taylor's lead and dive into the world of public speaking. There's no better way to boost your business and increase name-recognition and visibility. **SSE**

Scott Topper, three-time Emmy Nominated TV Show Host, and Corporate Improv Skills Coach, helps organizations and individuals learn business improvisational skills and theatrical techniques to achieve better sales presentation results and gain confidence through his fun, interactive corporate presentation skills workshops.
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Can Anybody Sell...?

Yes, if you follow a few simple rules

By Jeremy Francis

I don't know about you, but it's not often that I meet an effective sales person.

It isn't the buyer's fault. Buyers, guess what, generally want to buy. And they can even buy without being tiresome or difficult if they are helped to buy rather than sold to.

What's the difference?

The difference is empathy with the buyer and an understanding of the buying process. Grasp these two essentials and selling becomes a problem solving skill that anyone can employ.

When, as a buyer, I meet sales people I simply want them to follow a few simple rules.

Let me outline them.

Make Me Feel Special

Demonstrate that you have done some research and know something of my market sector, my business, my organization and, perhaps, even me! Given my job and the reality of current trading, show an understanding of my likely challenges and goals. Speak to me strategically and demonstrate an understanding of underlying commercial, business and financial issues. Don't bluff and don't show off, instead show me that you have taken the trouble to bring more than just you and your product to the meeting.

Discover My Needs

As a buyer I wouldn't be meeting you if I didn't have needs; needs that neither I nor others within my organization can meet. So please ask me about what I'm trying to achieve, how I am trying to achieve it, my priorities, my opinions, previous experiences of other suppliers and products, what's worked, what hasn't and why. Identify any major financial constraints. Ask how would I measure the success of a product, service and supplier and how that success would impact upon my business.

Ask me about time frames, others involved in the decision and how the buying process works. Identify who else you might need to talk to. Don't sell. Question and listen so that you can build up the picture. I need your help to tell me the true reality of my situation, to verbalize what the solution might look like and to understand how that solution can be best brought to bear to achieve my goals.

Consult with Me

Take each issue in turn and help me come to a conclusion with which I am comfortable. Where necessary educate me (but don't be patronizing). Simplify issues and problems. If appropriate, sketch diagrams, use illustrations, explain what is (or is not) happening right now and why. Give me advice; use other customers as case studies so that I don't feel alone. Reassure me and give me time to understand what you are saying. Some of it might be a surprise and I'll need to take it in.

Confirm with Me What Needs to Happen Next

The issues may be so straightforward that you can prepare a proposal immediately. Or it may be you have to meet others in my organization for a more in depth study of my needs. Fine, give me good reasons and I'll help you involve others. Perhaps you need to think about it and consult with your own colleagues first. That shows you haven't got all the answers and that you want to get it right. Maybe you want to return with someone else, a specialist, to carry out further fact finding. If it makes the solution better, then again, fine. Do it. Whichever route you suggest, do so revealing the experience and judgement that draws you to this conclusion.

Show, too, that you know that I need to make the right decision the first time. And show, through every conscious and unconscious signal, that you would like to do business with me tomorrow as well as today. Understanding, openness and commitment can only increase my confidence in you.

Involve Me in the Presentation of Your Proposal

When you present your solutions to me don't make it a slick one-way sales pitch. Take me through your proposal one stage at a time, discuss points with me, let me put you on the spot, test you out, ask the difficult questions and pose objections. In the final analysis, this is the only way that I can assess the quality of your proposal and discover if I can trust you. When you've presented your proposal, then please leave me alone. If you will, ask when it would be convenient to call and enquire if we need any more information or advice. But don't pester me; let me get back to you. I have to own the initiative in order to be truly committed to the decision.

The key to me buying from you is that I respect you, I trust you and you have taught me to believe in the product or service you offer. I shall buy from you because during the buying process I've glimpsed how you and your organization perform and whether you truly value me as a customer.

Talk at me, be overly smooth, drown me in product talk and feign sincerity and you'll get the response you deserve - `Very interesting, I'll get back to you'. And of course, the chances are I won't!

Can anyone sell? In my view, all too few are capable of doing it well. Can anyone sell? The answer is 'of course', because, let's face it, it's only common sense and empathy with the buyer. And all of us are buyers. **SSE**

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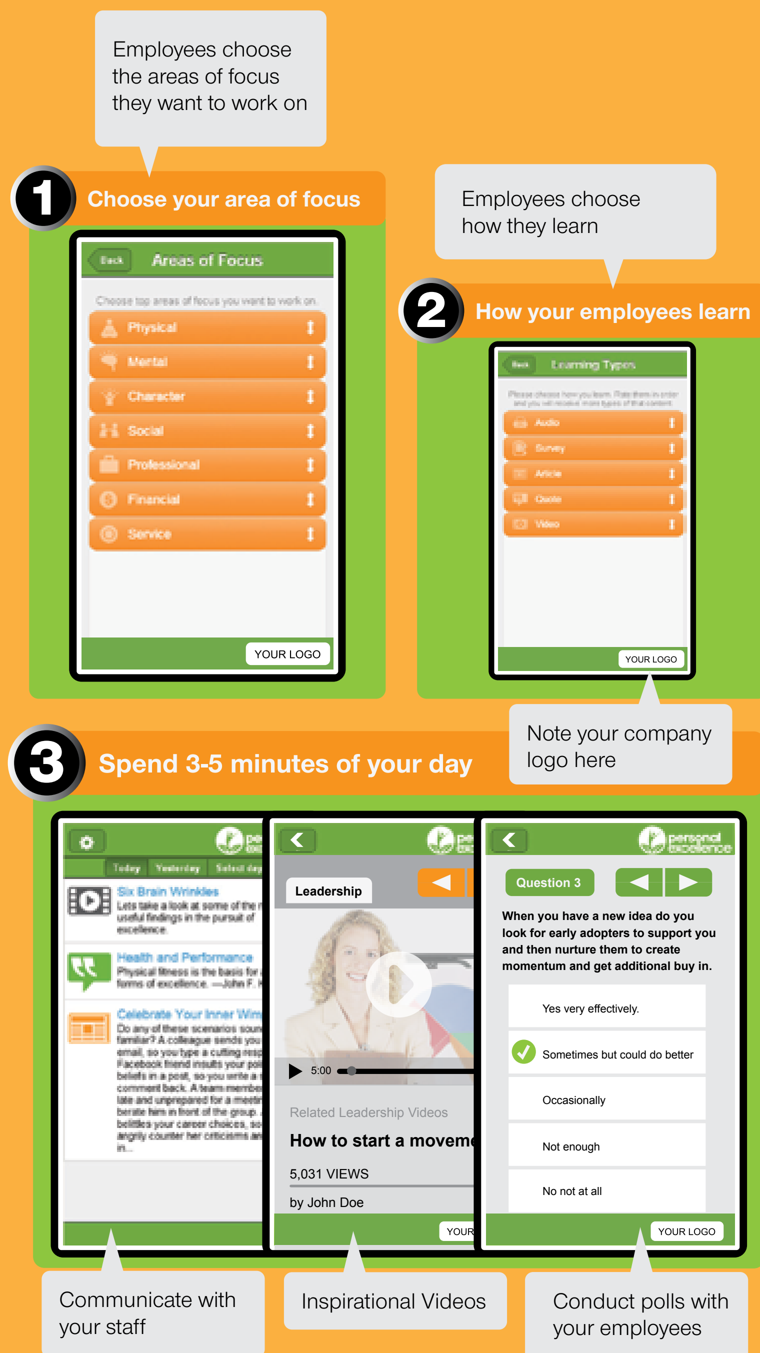

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Position with Power

Influence customers' buying decision

By Dave Kahle

His eyes were narrow and bloodshot from staying out late and partying too heavily the previous night. A two-day old stubble framed his face. He was wearing a dark colored tee-shirt, which he hadn't tucked in, a pair of jeans, and scuffed loafers which had probably never seen shoe polish. It was the second day of my Sales Academy seminar, and this participant in the program was complaining to the group that his customers were only interested in low price.

I didn't say this because I didn't want to embarrass him in front of the group, but I thought it nonetheless, "Do you think your appearance and demeanor have anything to do with your customers' reaction? Do you think that you may give them the idea that you are the lowest rung on the pricing scale? Is it possible that you have inadvertently positioned yourself as the Wal-Mart of the industry?"

I remember, as a child, having a sales person call to my family. He had an appointment to discuss a correspondence course for one of us. He drove a big Lincoln, dressed richly, spoke articulately, and carried himself with confidence. It wasn't a coincidence that we bought his program without quibbling about the price.

These two scenarios illustrate a powerful and frequently overlooked best practice in the world of sales -- whether you intend to or not, you always create a position in the minds of your customers, and that position influences the customer's attitudes toward you as well as the buying decision that follows. In other words, if you look like you're the low price, your customers will expect you to be the low price.

It follows, then, that if we are going to be an effective, professional sales person, we ought to give thoughtful consideration to how we position ourselves in the minds of our customers.

Let's begin by understanding the idea of positioning a little deeper. Positioning has long been a term bandied about by advertising mavens and marketing gurus. They define it as the place that your brand or product has carved out in the mind of the customer. It's the pictures that enter the customers' mind when they think of your product, the feelings that your product evokes, the attitudes they associate with you, and the thoughts they have of you.

Chances are, for example, the words 'Volkswagen Beetle' evoke a set of responses from you that are different than 'Chevrolet Corvette'. You expect a certain degree of quality, price and service when you enter a Wal-Mart that is not the same as your expectations upon stepping inside a Saks Fifth Avenue store.

Billions of dollars are spent every year on carefully crafted impressions by businesses anxious to carve out a valuable position in the minds of their customers.

Alas, if only the same thing could be said of many sales people.

Just like the carefully designed impressions by advertising mediums inexorably chisel a spot into our psyches, so do the repeated visits by a sales person embed a set of expectations, pictures and emotions into the minds of our customers. The position you, as a sales person, occupy is a complex intertwining of the perception of your company, your solutions, and yourself. The most effective sales people and sales organizations understand that, and consciously work to create a positive position in the minds of their customers.

Creating your Position

Let's begin at the end. A good starting point is to think deeply and with some detail about what sort of position you want to create. What, exactly, do you want your customers to think of you? Let me suggest two possibilities -- the minimum acceptable position, and the ideal position.

At a minimum, I believe your customer should view you as a competent, trustworthy person who brings value to the customer. They believe that you generally know your products and their strengths and weaknesses, that you generally know the customer's issues, and that you can be reliably counted on to do what you say you will do. That's the least acceptable position to which you should work towards. If your customers don't think of you at least in this way, you probably should not be in sales.

At the other end of the spectrum is the ideal position. This builds on the minimum, but adds a specific understanding on the part of the customer of your unique combination of strengths and attributes. It evolves as you have history with the customer until you occupy a position that is totally and uniquely yours and that carries with it the expectation that your strengths in some specific and unique way add value to the time the customer spends with you. The ultimate test of the power of your position is the customer's willingness to see you and the resulting preference for doing business with you.

Here's an illustration. If you were shopping for an automobile, a low-mileage late model Taurus would probably provide you with competent and reliable transportation. So, when you think of that specific automobile, it would evoke a set of ideas in your mind all revolving around competent and reliable transportation. Now, think of a brand new Lamborghini and you would understand it to be transportation, but with a unique flair – something above and beyond just reliable transportation. That flair would be a result of the unique strengths of that particular automobile conveyed in a graphic way to your mind.

So it is with sales people. You want to position yourself in your customer's mind the equivalent of the Taurus. But if you really want to carve out a unique, memorable position in your customer's mind, you'd want them to think of you as a Lamborghini.

The question then is, how do you want your customers to think of you? Once you articulate a specific picture, you can then start to build that position.

Your position in the minds of the customer is a powerful and subtle component of an effective sales person's approach. Consistently working at building a positive position will pay dividends for years. **SSE**

This article is available in an expanded version here

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Millennials serving Boomers

What you need to know to serve better

By Jodi Beuder

Put a Baby Boomer and a Millennial in the same room, and you're likely to notice differences -- from their shopping preferences to their methods of communications. After all, Millennials reached young adulthood around the year 2000, while Boomers were born between 1946 and 1964. There are bound to be differences. How do you ensure that these generational variances don't get in the way of good customer service? Read on.

Let's start with some key differences in behaviors and expectations.

Baby Boomers are generally brand loyal. They have used the same brands for decades, and have clear expectations on what those products should deliver. By contrast, Millennials take pride in switching it up. They have no problem moving to the latest or newest technology or product. They don't consider it disloyal; they see it as common sense.

Baby Boomers tend to pick up the phone to make a call when they want answers. Even better, if they have the time, is a face-to-face encounter. Millennials text, tweet, email, Instagram, Pin it or Facebook. They will use all forms of online communications and switch between them seamlessly.

To Baby Boomers, the Internet is still exciting and new. They may be familiar with technology, or just learning it. To Millennials who grew up with technology, the Internet is like a flush toilet or electricity. It is part of life as they've always known it. They're used to the instant gratification that comes with it, and probably haven't ever had to wait for a letter with a stamp. Importantly, Millennials shouldn't just assume that Boomers have no knowledge of the Internet or are inept at online communications. Just because they didn't grow up with it, doesn't mean they don't use it.

Boomers define good customer service as getting their questions answered, and having time spent on their purchase or problem resolution. Millennials are more likely to judge good customer service by its speed and convenience.

Baby boomers like the personal touch. They like answers that are explained thoroughly. Millennials save face-to-face communications for messages that are very important. Their day-to-day social interactions are abbreviated, even to the point of using acronyms to communicate.

Customer Service Strategies: Millennials Serving Baby Boomers

Share the following strategies with your Millennial employees so that they can better serve the Baby Boomer market.

- **Find out what your customer already knows about your product or service.** This way you can get them the help they need without extra steps. Ask, how familiar are you with our product or products similar to ours? Then, you can start the conversation in their comfort zone, without talking down to them.
- **Sell the story behind your product and service.** Baby boomers are brand loyal because they are emotionally tied to those brands. Help them form a connection with yours, by sharing the story on your website, in the product materials, and as applicable in your communications with them.
- **Reduce the hassle factor.** Boomer customers are time challenged, caring for aging parents and working, commuting, and dealing with their adult children. Give them access 24/7 to a way to order, ask questions, and resolve problems. Proactive offers of gift wrap and shipping services also will be helpful to them.
- **Take the time to explain things.** A Boomer customer wants a full explanation more than he or she wants a speedy result. Resolution is still important, but doesn't have to be instantaneous.
- **Communicate clearly in plain English.** Don't talk in the acronyms or casual slang that you use with your friends. You don't want anything lost in translation when you are working in customer service.
- **Remember you already know a lot about the Boomer generation.** Millennials are generally the children of Baby Boomers. If not, it's likely they have someone in their family in the Boomer generation. Use that knowledge to provide the type of communications and service that you know that generation enjoys.
- **Remember that good customer service is still good customer service.** Listen. Make sure you understand what your customer needs. Then deliver that product or service. **SSE**

The article first appeared here.

Jodi Beuder, Customer Experience Advocate at Impact Learning Systems, believes customer service exists not just outside the company, but inside, too. With over 17 years in Marketing Executive roles, Jodi has dedicated her career to assisting companies grow their brand presence and sales, and most importantly, their customer retention and satisfaction.
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Bending the Rules

Helps winning and keeping customers

By John Tschohl

There are rules for a reason; they work for most people most of the time. Often scientific evidence backs them up. However, as with almost any other endeavor in society that doesn't involve criminal activity, rules can sometime be broken -- or at least bent -- without the world coming to an end.

This is especially true in business. Company owners and top executives give a lot of thought to winning and keeping customers -- and spend a lot of time and money on things such as PR, leadership training, social media campaigns etc. etc. However, the real front lines of building a business are in the daily interactions employees have with customers.

One of the major roadblocks to customer service excellence is policies/procedures most companies have in place to make sure that one percent of their customers don't take advantage of them. Meanwhile, the other 99 percent of their customers are frustrated. When front-line employees are restricted with ridiculous policies and procedures, the process of servicing customers is dramatically slowed down and customers are essentially given the boot and will soon be greeted with open arms by the competition.

Get Rid of Stupid Rules. Sounds simple but in reality, as the rules don't always apply, make a decision to bend some and for sure to break some.

Look at all the policies, procedures and systems you have in place that make life miserable for your customers. You could have the nicest people in the world, but you could have stupid hours, stupid rules, and stupid procedures that just burn customers.

If you have policies that slow down tasks or require two or three sets of eyes and signatures for approval, you are wasting time and money… speed up the process and eliminate time wasters.

Bend the Rules. Rules stop employees from thinking for themselves and for customers. In order to ensure customer satisfaction and deliver against the very demanding expectation of your customers, you should try to widen your employees' customer service skills by teaching them how to bend the rules. It's not about breaking the rules, but bending them to keep customers happy. Put yourself in your customer's place and ask… do you like to feel valued, listened to and have your requests respected? How do you feel when an organization solves your problem without any hassle? How do you feel when they cannot or will not fix your problems at all?

It's critically important for businesses to give employees the power to make decisions on the spot because one policy can't cover everything. There are too many unexpected things that happen every day.

Service Recovery. In all organizations mistakes happen. Things go wrong. Employees need to know they don't have to follow a canned script. They are allowed to think like owners of the company. They need to know they should treat every customer the way they would want to be treated, even if it means ignoring official company rulebook. Employees must bend the rules and make empowered decisions to save customers.

The best news is that most decisions will cost the company less than $50, which is a pittance when you consider the lifetime value of a customer, and the good will that empowered decisions can make. Every company has something it can give to a customer who experiences a problem. It doesn't have to cost a lot, but its value as far as goodwill and customer loyalty are concerned will be priceless.

Identify 10 to 20 products your company has that have value in the eyes of the customer, but won't cost you an arm and a leg when used as compensation for a problem. For an airline that might be a first-class upgrade, while for a dentist it might be a free cleaning. Redbox gives away two free DVD rentals when there is a problem. Customers will be pleasantly surprised and delighted with your company if you make things right and make things better.

It Serves Everyone to Bend the Rules. Your customer gets what they need and are happy. Your organization strengthens a relationship with a client. The employee is recognized for solving a problem and retaining business.

Remember, just good service doesn't get anyone talking about you. Bend the rules a bit and get them buzzing about you. **SSE**

John Tschohl, an international service strategist and speaker, is founder and president of the Service Quality Institute in Minneapolis, Minnesota. Described by Time and Entrepreneur, and USA Today magazines as a customer service guru, he has written several books on customer service.
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World at Their Fingertips

Empowering field technicians

By Judy Philbin

The face of field service has changed drastically from the traditional model. Once upon a time, when a company received a service call, a receptionist scheduled the field technician who arrived within an agreed upon window of time, fixed the problem, and moved on to the next job. This technician retained a remarkable depth of knowledge for a specific product line and could fix almost any problem on the spot.

But those days are behind us. Today**,** service delivery is managed on a global scale. Technology is complex and changing rapidly. Highly skilled technicians may be sent around the world. Customers have become accustomed to immediate solutions with 24/7service. And competition is such that costs must be watched and trimmed at every possible turn.

Highly successful field service organizations utilize upgraded technology and tools, sophisticated scheduling techniques, mobile information sources, high-level training strategies, and methods of communication unheard of just a decade ago. They gather information at all levels of customer interaction, using it not only to resolve technical issues, but to proactively forecast and allocate resources, evaluate the efficacy of their processes, and intercept possible service issues.

Information and Teamwork: Two Keys to Success

It has been said that it takes a village to raise a child. The same could be said about delivering quality field service to today's customer! Information, along with insight and feedback provided by an extended family of team members, is necessary to maintain a well-oiled fleet of field technicians. Based on a recent study by the Aberdeen Group, here are some recommendations:

- **The Mobile Technician:** On-site mobile devices help technicians navigate the constantly changing landscape while on the go and out in the field. A wealth of 'shared knowledge' and training is available via social networking sites and blogs. Up-to-the-minute reports on recalls, warranties, patches, regulations, work instructions and other solutions can be posted as they arise. One example of cutting edge technology is the prospect of using smart glasses, such as Google Glass. Field technicians may someday use them to quickly communicate with dispatch from anywhere, video chat to receive instruction from company experts, and have hands-free access to information while diagnosing and repairing a complex problem.
- **Two-way Communication:** Technicians in the field can also gather valuable data for 'the team'. Is there an issue that engineering, design, sales or other technicians should know about? Additionally, real-time data provide useful metrics regarding the time and resources needed for each service resolution. Parts can be tracked immediately and seamlessly. The front office can use this information to communicate promptly and accurately with the customer regarding job status, completion forecasts, invoicing, etc.
- **Listen to the Machine:** Most equipment now provides maintenance data and can even warn of a possible failure. Technicians can and should have access to as much information as possible, prior to their visit, so that an issue can be resolved more swiftly. Top field service companies also tap into this data to proactively schedule preventative maintenance calls.
- **Knowledge Transfer:** Legacy among the workforce is vital, as well as money in the bank. Don't assume that managers have all the answers. Develop processes whereby legacy experience is shared from technician to technician and region to region in order to build on the valuable body of wisdom acquired by those in the front line.

The Value of Insight and Feedback

Information gathered from service calls can be used to forecast service demand and allocate resources. It can also be used to analyze and improve processes. Top performing field service companies are constantly checking the success of their processes against metrics data provided from the field. By using data and feedback that is readily available, they can track the success of resource allocation forecasting, rate of 'first-time fix' events, and customer satisfaction responses. This allows mangers to tailor training programs that specifically meet the needs of the field team while improving customer satisfaction. SSE

Judy Philbin, a long-time independent contractor, copywriter and editor, understands the importance of focused listening, quality delivery and customer service.
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Psychology of Effective Communication

Q&A with Dr Stephen Kosslyn

By Megan Van Vlack

You've probably heard the maxim 'think like your customer' in both marketing and service contexts; however the phrase takes on new meaning when psychological research is applied to how organizations communicate with their customers. But companies can (and should) take advantage of this research to improve customer experience, explains Stephen M. Kosslyn, former chair of the psychology department at Harvard University and founding dean at the Minerva Project. Here, we speak with Kosslyn about how psychological research can be applied to improve the way service professionals communicate with customers:

Q: Is it more effective to show a customer how to solve a problem or to explain it step by step?

Choosing whether it would be best to show the solution or explain it is going to depend on the problem itself. Showing is not always better than telling, but it can have several advantages. Showing a person a map, for example, will allow them to come up with multiple ways to get from point A to point B on their own. If you just hand a person a list of directions, it will really constrain and limit the outcome. It can also be overwhelming if, for example, the customer needs to do something very specific and the information they need isn't on the list. Showing is a good way to give people more options.

Q: When is an in-person interaction more effective than directing them to, say, the company website?

This depends partially on the customer. People don't always want an in-person interaction. In some ways, that might be more of a cognitive effort for them and they would prefer to just read something. On the other hand, when something isn't working, not everyone knows how to solve the problem. The good thing about personal interaction is that it affords the opportunity for quick feedback. When you're dealing with something that's frozen, such as a map or a list of directions, they are only useful if they solve the exact problem. An in-person interaction gives the customer the ability to draw out the information that they need from the service professional.

Q: How can service professionals help customers who might not know exactly what they need?

Depending on the problem, you would approach it in different ways. One advantage of interacting in real-time is an instant feedback loop that allows you to converge on the problem quickly.

It's important that the first thing a service professional does is make sure that they understand exactly what the problem is. One effective way to do that is to simply paraphrase what the customer has said. Repeating the issue back to the customer can also be a very focusing experience for the service professional, and it can help them solve the problem.

Another thing that service professionals should keep in mind is that people can hold a very limited amount of information in their mind at once. It's surprising, but people can only hold three to four categories of information at a time. When imparting information to customers, keeping it simple is key.

Q: Any advice to organizations that are developing their customer service channels?

The main thing to remember is that people are different. It's important for companies to give people the ability to help find solution to their problem in a way that fits the way that they think and approach things. The key to all of this is to respect each individual customer's differences. SSE

The interview first appeared here.

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Customer-Centric Culture

Live up to customers' expectations

By Tron Jordheim

There are plenty of places to rent tools and equipment in any town, anywhere. When people need to rent a post-hole auger or a trencher, many go to the local, family-owned equipment rental shop -- because of the experience. It is not a sparkling clean place. In fact, it looks a bit like a glorified tool shed, with all the grease and dust one might expect. They haven't built their business and retained their customers for decades because of the décor; their regulars return because of the staff-customer relationship that makes renting at their business an enjoyable, and personal experience. They appreciate that when they walk through those dusty doors, the employees know their name and their needs.

We all have our own shopping styles and preferences. No matter how you slice it, shopping and buying comes down to basic pain and pleasure stimuli and responses -- we are subject to conditioning. Places and actions that we associate with pleasure we seek to experience again, and we seek to avoid experiences that cause us pain. Your customers go through this process during every contact they have with you, and it's paramount that when they leave your establishment, they leave glowing with a desire to return.

Craft a customer-centric culture; focus on their experience from point-of-entry to point-of-sale to increase growth and retention.

There are five touchstones to establishing a customer-centric culture, and putting them into practice will give you a leg up on your competition.

Audit Your Customers' Experience

An experience-audit aids in identifying your customer type, and allows you to model your business based on their needs. When you put yourself in your customer's shoes, you know best how to serve them -- and build a profitable business in the process.

Put yourself in the mind of your customer by conducting a simple audit of the pains and pleasures involved in your business. Make two columns on a piece of paper and title one *Pain* and the other *Pleasure* and walk through the entire process your customer walks through while dealing with you. Track each individual perception of pain or pleasure -- you may be surprised at the number of negatives. Do the pains and pleasures correspond with the type of business or service you provide and with the types of customers you have?

Learn Your Regulars

Local, family owned equipment shops have become a staple because the owners and staff created relationships with their regulars. They built a culture and environment of 'the neighborhood rental shop', where their customers knew they could go for their equipment needs, but also friendly conversation, teasing and jokes from the staff -- where you're expected, as the customer, to engage in the banter and give it right back.

Your regulars become your mouthpiece in the market; recruiting new business and customers simply by word-of-mouth praise. When you form longstanding relationships with your regulars and recognize their individual likes and dislikes, you can tailor an experience that feels distinctly personalized and negates any inherent *pain* that accompanies your industry -- which will generate business success with increased customer growth.

Hire Staff that Mirror Your Culture

All the time and effort that you exert to make your business a one-of-a-kind, individualized experience is negated if your staff does not mirror these values and ideals. Your employees are the keepers of your culture; the ones who maintain your operating standards, customer-service practices and the atmosphere that distinguishes you from a similar shop down the street.

You must be meticulous with your hiring practices to ensure you're bringing the correct people onboard. Reject candidates who do not parallel your customer-centric model. Instill in your new hires the magnitude of your business philosophy.

Don't Overcomplicate and Trust in Feedback

There are occasions when business owners actually diminish their customers' experience in an attempt to overcomplicate their service practices. A prime example of this occurred at a local grocery store during their first year in business. Customers would often leave their carts throughout the parking lot. The owners and staff did not have return racks for carts because they did not want to convey an obligation for their customers to return them to the store -- they wanted them to leave them in the lot for the employees' to collect. While a nice sentiment in theory, in practice they were creating a parking lot situation full of obstacles and potential damage to their customers' vehicles.

After receiving feedback throughout the year, they decided to install permanent return racks in the parking lot, and while it requires a bit more effort on the part of their customers, they no longer have to navigate a minefield of carts or risk damage when they come to shop.

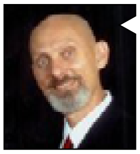
Considering any and all feedback is a paramount component to running a thriving business. Your experience-audit will assist in determining their validity, but you should always take heed to what your customers are saying. Your customer service practices should be organic and seamless and never overcomplicate their shopping experience.

The Product and Service Parallel

If the product you sell or the service you provide does not live up to your customer service, then your patrons will not return. All of the perks of choosing your business over your competition go out the window when what you offer fails to live up to expectations.

There must be a direct parallel between the way you treat your customers and what you provide them -- if you don't, your base will begin to dwindle. They may head to the shop down the road that doesn't nail the customer service aspect, but they always receive the service or product they expect once they leave.

Shopping or conducting business should not feel like a chore best avoided: it should be an enjoyable experience, one that your customers desire to repeat. A customer-centric culture defines you, and will carve out your share in the market as the place to go -- and put you ahead of the competition. **SSE**



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Never Be Closing

Sales conversation; a relationship in three acts

By Tim Hurson and Tim Dunne

As it turns out, the most useful structure for facilitating commercial transactions owes a lot to the Greek philosopher Aristotle. In 335 bce, Aristotle observed that the best of Greek drama employed a three-act structure -- presenting a story with a beginning, middle, and an end.

Almost every play you attend, movie you see, or story you hear relies on this same three-act structure -- from *A Christmas Carol* to *Toy Story* to *Star Wars*. It's used in novels, comic books, short stories, and even video games. The three-act structure builds on the way human beings naturally process complex information. It's as old as mankind's need to communicate.

Act I introduces the characters and their situation, and then presents a turning point, often called a plot point that forces the protagonist to take some action. This usually takes the first 20 to 30 percent of screen time. Act II throws up challenges to the hero, leading to a make-or-break crisis, which is the second major plot point, and drives the story into the final act. This generally takes up the middle 50 percent of the story. Act III plays out the resolution of the crisis, with the protagonist winning (or losing) the battle. This usually takes up the final 20 to 30 percent of the film.

Star Wars producer Gary Kurtz described how he learned about the three-act structure this way: "I took a master class with Billy Wilder once and he said that in the first act of a story you put your character up in a tree and in the second act you set the tree on fire and then in the third you get him down." Here's a graphic representation of the three-act story structure:

Like the best films, fairy tales, and fiction, the most productive sales meetings also use a three-act structure -- with a beginning, middle, and an end.

The three acts of the sales conversation are:

I: Earning the Right to Ask
II: Exploration
III: Demonstrating Usefulness

To drive the meeting forward, the first and second acts contain turning points, just as in a drama, that signal the beginning of the next phase of the interaction.

Here's how it works:

In Act I, you work to earn the credibility to ask probing questions. Once you cross the credibility threshold, you propel the meeting into its second act. In an hour-long meeting, Act I may last from ten to fifteen minutes.

In Act II, you explore your client's needs by asking a series of carefully designed questions that help both you and your client better understand the issues and challenges that need to be resolved. Its turning point is the catalytic question -- the question that provokes genuine interest, clears away the fog, motivates a desire to act, and opens the door to novel solutions. This turning point drives the meeting into its third act. In an hour-long meeting, Act II may last about thirty minutes.

In Act III, you demonstrate usefulness to your client by offering resources and insights, matching your client's needs to your products or services, and establishing the basis for a continuing relationship. In an hour-long conversation, Act III may last about fifteen minutes (however, if you're really being useful to your client, your meeting may go beyond its original end time).

Like many dramas, the sales story often has a Prologue -- an opening scene that takes place before the main story and gives background details that help in understanding things as they unfold. And, like many plays, the sales story may also have an intermission.

There's one other crucial element in any story or sales meeting -- the people involved. Whether in stories or sales, every character has unique interests, traits, hopes, and fears. They take in information in different ways and express themselves in different ways. The better you understand the characters in a story, the more you can appreciate the story itself. Similarly, the better you understand the people in your sales meeting, the more productive you can be. **SSE**

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