Chapter 1 – Sales Organization Stages

Sales Organization Stages

- BUILD
- COMPETE
- MAINTAIN
- EXTEND
- CULL

Adolescence | Adult | Middle-Age | Seniority

Sales Organization Evolution
Chapter 19 – Likelihood of No Decision

Name of Account: ______________________

<table>
<thead>
<tr>
<th>Stress Type</th>
<th>Low</th>
<th>Medium</th>
<th>High</th>
</tr>
</thead>
<tbody>
<tr>
<td>Informational stress</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>Vendor stress</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>Budgetary stress</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>Evaluation committee stress</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>Corporate citizenship stress</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>Organizational stress</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
</tbody>
</table>

Add up your points and compare the results to the categories below:

- 22 points and over: High likelihood of no decision
- 17 - 21 points: Medium likelihood of no decision
- 16 points and under: Low likelihood of no decision

<table>
<thead>
<tr>
<th>Is the information being presented truthful?</th>
<th>Is the tug of war between vendors equal?</th>
<th>Is money available and justified to be spent?</th>
<th>Why can’t we agree?</th>
<th>Is it in the best interest of the company?</th>
<th>Should we really do it?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Informational stress</td>
<td>Vendor stress</td>
<td>Budgetary stress</td>
<td>Evaluation committee stress</td>
<td>Corporate citizenship stress</td>
<td>Organizational stress</td>
</tr>
</tbody>
</table>

5 4 3 2 1
Chapter 21 – Account Control Spider Chart

7. Access and rapport with the senior executives who must approve the decision

6. Accurate understanding of account standing and whether you are winning or losing

5. Privileged intelligence about the politics of decision making and who is for or against you

4. Ability to persuade evaluators to follow your advice and disseminate information on your behalf

1. Intimate knowledge of selection, negotiation, and procurement processes

2. Ability to influence the selection process

3. Trusted relationships with evaluation team members
## Chapter 21 – Sales Strategy Creation

<table>
<thead>
<tr>
<th>Sales cycle</th>
<th>Account control</th>
<th>Customer interaction</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Type of product</strong></td>
<td>People involved in decision</td>
<td><strong>Build rapport and relationships</strong></td>
</tr>
<tr>
<td>Point-specific</td>
<td>Politics of decision-making</td>
<td>Likability and harmonious communication</td>
</tr>
<tr>
<td>Platform</td>
<td>Buyer personas</td>
<td>Trusted advisor relationship</td>
</tr>
<tr>
<td>Enterprise</td>
<td>Human nature of decision-making</td>
<td></td>
</tr>
<tr>
<td><strong>Type of sales cycle</strong></td>
<td>Process of engagement</td>
<td><strong>Establish situational dominance</strong></td>
</tr>
<tr>
<td>Renewal/add-on</td>
<td>Established sales process</td>
<td>Professional differentiation</td>
</tr>
<tr>
<td>Persuasion</td>
<td>Sales intuition and pursuit knowledge</td>
<td>Influencing of opinions and beliefs</td>
</tr>
<tr>
<td>Creation</td>
<td>Positional tactics based on competition</td>
<td></td>
</tr>
<tr>
<td><strong>Type of buyer</strong></td>
<td><strong>Product and company positioning</strong></td>
<td><strong>Gather information</strong></td>
</tr>
<tr>
<td>Intra-departmental</td>
<td>Value, ROI, and proof points</td>
<td>Discovery and competitive perceptions</td>
</tr>
<tr>
<td>Consolidator</td>
<td>Best practices and successful clients</td>
<td>Deal qualification and triangulation</td>
</tr>
<tr>
<td>Consultant</td>
<td>Business compatibility</td>
<td></td>
</tr>
<tr>
<td>Responder</td>
<td></td>
<td><strong>Educate</strong></td>
</tr>
<tr>
<td>Bureaucrat</td>
<td></td>
<td>Learning styles and information dissemination</td>
</tr>
<tr>
<td><strong>Key evaluators</strong></td>
<td><strong>Provocation versus alignment</strong></td>
<td>Handling of objections and changing opinions</td>
</tr>
<tr>
<td>Coach</td>
<td>Alignment with customer’s thought process</td>
<td></td>
</tr>
<tr>
<td>Bully with the juice</td>
<td>Transformation of customer’s thought process</td>
<td><strong>Motivate action and close</strong></td>
</tr>
<tr>
<td>Emperor</td>
<td>Provocation of customer’s thought process</td>
<td>Achievement of sales call goal and outcomes</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Mutual understanding and purchase motivation</td>
</tr>
</tbody>
</table>
Chapter 30 – The Buyer’s Journey

Progression of the sales cycle

- **Buyer research Stage**: Research of vendor offerings by customer online, Buyer’s journey completed independently.
- **Solution stage**: Introduction of competing sales teams, Sales team’s direct influence.
- **Business stage**: Business value and philosophical fit assessment.
- **Political stage**: Final decision process, Why buy now? Sales team’s indirect influence.

Why buy a particular solution?
Chapter 39 – Flanking Strategy Action Plan

<table>
<thead>
<tr>
<th>Priority</th>
<th>Flanking Description</th>
<th>Owner</th>
<th>Target Date</th>
<th>Predicted Success %</th>
<th>Completed Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>2</td>
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<tr>
<td>9</td>
<td></td>
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</tr>
</tbody>
</table>
Chapter 45 – Quarterly and Annual Client Business Reviews

**Session Kickoff.** Introduction of attendees and review of the agenda and objectives for the session. Discussion of meeting methodology, preparation steps, and research.

**Account Status Overview.** High-level assessment of where the account stands that includes completed milestones and proof points showing accomplishments.

**Metrics, Trends, and Rankings.** Metrics from the vendor’s perspective that provide a snapshot of current performance and historical trends. Metrics from the client’s perspective showing how the customer ranks in comparison to other clients or industry-published statistics.

**Best Practices Recommendations.** Real-world examples that provide specific recommendations on how the client can improve product usage, streamline business processes, and drive profitability.

**Company Update.** New information including recent company developments, financial results, customer success stories, and industry reports that help the client understand your company’s direction and success to validate the client’s commitment to your company.

**Client Vision Road Map.** Discussion about the future partnership that maps out the vision of where you and your client are headed together, whether it be through new products, additional services, or entirely new ventures.

**Post-Meeting Survey and Takeaways.** Meeting takeaways including eye-catching graphics that easily communicate the topics that were covered. Online survey where attendees can anonymously rate the quality of the meeting, share their thoughts, and provide advice on how to improve future meetings.
Chapter 47 – Sales Strategy Planning Checklist

Use the following checklist to help you prepare for your next sales strategy. (Source chapters are referenced in brackets.)

☐ What's my initial account strength, and are my product, personnel, and company at an advantage, equal, or at a disadvantage to the competition's? [15]

☐ Is the deal far outside my zone, or was my RFP response score test over fifty? [15]

☐ Is this a renewal/add-on, persuasion, or creation sales cycle? [16]

☐ What buzz-kill moment should I prepare for? [17]

☐ Has a turning point already occurred that will prevent me from winning? [17]

☐ What is the likelihood of no decision being made, and was the stress test score over twenty-two? [19]

☐ What tactics will I use to motivate the customer to buy and overcome no decision? [19]

☐ What steps will I take to establish account control? [20]

☐ What is my quadrant position on the account control chart? [20]

☐ What does my account control spider chart look like, and what are the weakest radii? [21]

☐ How will I employ the indirect approach and create a turning point? [22]

☐ What positional tactics will I employ to gain account control? [23]

☐ What is my sales strategy statement? [24]

☐ Will I use provocation, transformation, or alignment? [25]

☐ What's the customer's budgeting process, and is this a planned, unplanned, or interrupt-driven purchase? [27]

☐ Is the customer price conscious, price sensitive, or price immune? [29]
# Chapter 54 – Business Operations Language

## Job Title:

**Create**
1. 
2. 
3. 
4. 
5. 

**Control**
1. 
2. 
3. 
4. 
5. 

---

## Job Title:

**Create**
1. 
2. 
3. 
4. 
5. 

**Control**
1. 
2. 
3. 
4. 
5. 

---

## Job Title:

**Create**
1. 
2. 
3. 
4. 
5. 

**Control**
1. 
2. 
3. 
4. 
5.
Chapter 71 – Measuring Sales Call Success

- Personal receptive state
- Technical receptive state
- Business receptive state
- Political receptive state

Great
Good
Average
Poor
### Chapter 72 – Buyer Personas

<table>
<thead>
<tr>
<th>Information Roles</th>
<th>Character Roles</th>
<th>Authority Roles</th>
<th>Company Roles</th>
</tr>
</thead>
<tbody>
<tr>
<td>Analytical</td>
<td>Comedian</td>
<td>Bureaucrat</td>
<td>Complainer</td>
</tr>
<tr>
<td>Believer</td>
<td>Dreamer</td>
<td>Dictator</td>
<td>Hired gun</td>
</tr>
<tr>
<td>Intellectual</td>
<td>Hothead</td>
<td>Empty suit</td>
<td>Integrator</td>
</tr>
<tr>
<td>Slacker</td>
<td>Maven</td>
<td>Old pro</td>
<td>Politician</td>
</tr>
<tr>
<td>Summary seeker</td>
<td>Optimist</td>
<td>Proctor</td>
<td>Pollyanna</td>
</tr>
<tr>
<td>Schadenfreuder</td>
<td>Pundit</td>
<td></td>
<td>Revolutionary</td>
</tr>
<tr>
<td>Straight shooter</td>
<td>Soldier</td>
<td></td>
<td>Vigilante</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Name and Title</th>
<th>Information Role</th>
<th>Character Role</th>
<th>Authority Role</th>
<th>Company Role</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>
Chapter 79 – Sales Call Preparation Checklist

Use the following checklist to help you prepare for your next meeting. [Source chapters are referenced in brackets.]

What is our goal and my personal outcome for the meeting? [50]
How will I obtain trusted advisor status? [50]
What interesting intersecting activities can I talk about with the prospect? [51, 52]
What familial relationship role should I assume during the sales call? [51]
Am I prepared to speak the customer’s technical specification language or do I need to bring along product specialists and other SMEs? [53]
What is the cause of the customer’s problem and our solution to solve the problem, worded in the business operations language? [54]
Has the customer spoken the confidential language with me in the past and what did he confide? [55, 66]
What pattern interruption and cow-catcher will I employ at the opening stage of the meeting? [57, 68]
What is my triangulation and qualification strategy? [58, 59]
What solution positioning statements will I use? [60]
What are the most difficult questions I expect the customer to ask and how will I handle them? [61, 62]
What customer success stories do I plan to share? [64]
Will my sales call strategy be based on alignment, transformation, or provocation? [65]
What leading questions do I plan to ask? [59]
How will I structure my presentation? [68, 69]
What are my primary closing strategy and fallback positions? [70]
How will I measure sales call success? [71]
What is the customer’s informational decision-making role? [73]
What is the customer’s character decision-making role? [74]
What is the customer’s authority decision-making role? [75]
What is the customer’s company decision-making role? [76]
What is my negotiation strategy? [82]
Chapter 92 – Top Salesperson Persona Test

1. Focus and Motivation

*Money is extremely important to me and how I measure my personal success*

- [ ] Very true
- [ ] True
- [ ] Neutral
- [ ] Untrue
- [ ] Very untrue

*Being respected and recognized as one of the best by my peers at my company is very important to me.*

- [ ] Very true
- [ ] True
- [ ] Neutral
- [ ] Untrue
- [ ] Very untrue

*Which statement best describes you?*

- [ ] I am very dependable and good at prioritizing my time.
- [ ] I am a likable person who makes customers feel comfortable.
- [ ] I believe my knowledge is powerful.

2. Career Orientation

*I am the type of person who*

- [ ] Lives my life one day at a time
- [ ] Has a written or mental list of tasks I want to accomplish
- [ ] Frequently thinking what my future will be like in five, ten, or more years

*The fundamental reason I’m in sales is*

- [ ] I like to control my own destiny
- [ ] The harder I work, the more money I make
- [ ] It suits my personality
- [ ] It just happened naturally

3. Customer Interaction Strategy

*Rank the following sales strategies in order of effectiveness:*

- [ ] Asking questions that show your expertise
- [ ] Driving the topics of conversation
- [ ] Getting the customer to emotionally connect with you
- [ ] Showing the value and benefits of your solution
- [ ] Tailoring your sales pitch to the customer’s needs

*I tend to*

- [ ] Feel personally responsible and dedicate myself to ensure my clients’ success
- [ ] Have cordial relationships with my clients because we are both busy
- [ ] Keep a general pulse on what’s happening with customers after the sale
- [ ] Develop very close personal friendships with my clients
4. Attitude

Let's do a word association. Write down the first word that comes to your mind when you read the following:

Sales manager ________________
Sales process ________________

5. Self-Perception

Please pick the top two qualities you think prospective customers admire the most about you:

- Athleticism
- Attractiveness
- Charisma
- Creativity
- Eloquence
- Enthusiasm
- Follow-through
- Industry experience
- Product knowledge
- Professionalism
- Sales acumen
- Technical aptitude
- Trustworthiness

Which statement do you agree with most when working with prospective customers?

- If the customer's best interest is served by slightly obscuring information, that's okay
- Subtle information manipulation is reasonable, so long as the truth is served.
- Sometimes you have to do whatever you must to get the important evaluators to back you.
- You don't have to point out every blemish of your product offering.
- Nothing but the whole truth is acceptable.

How would you describe yourself? Select the three words from the list below that describe you best.

- Charming
- Cheerful
- Confident
- Empathetic
- Frank
- Funny
- Humble
- Likable
- Productive
- Proud
- Quick-witted
- Responsible
- Shrewd
- Smart
- Tough
- Wise
- X-factor (a combination of all the traits listed)
Chapter 134 – Personal Sales Strategy Checklist

Use the following checklist to help you prepare for your next customer conversation. (Source chapters are referenced in brackets.)

**Action Plan**

What is my brand? [95]
How complete is my LinkedIn online persona? [95]
How will I establish situational dominance? [99]
How will I determine what the customer’s benefactions are? [101]
What personal attributes and traits should I emphasize? [106]
What do I theorize is the customer’s fantasy? [103]
How will I validate that the customer is telling me the truth? [104, 122]
What is the customers visual, auditory, and kinesthetic word catalog wiring? [110–113]
What is my visual, auditory, and kinesthetic word catalog wiring? [112]
How will I employ visual, auditory, and kinesthetic information to protect my price? [116]
How will I adapt my communication to the customer’s word catalog wiring? [117, 125]
How will I interpret the customer’s eye movements? [119–121]
What aspects of the customer’s physical layer will I monitor? [124]
What’s my communication level, and is it the same level as the customer’s? [126]
How will I ensure my speech is clearly

What customer coping mechanisms should I be prepared for? [128]
Am I respectful of the differences between male and female buyers? [130]
Do I have congruence in front of customers? [133]