The Baron Group, Inc.

Joint Sales Calls—
The Often Unrealized Opportunity

The joint call. The team call. The sales team call. Call it want you want. It refers to those situations when several people from an organization, usually as a result of the salesperson's efforts, visit a customer or prospect with the intent of doing some good work. Because all this talent is assembled, meetings like this represent opportunities for the customer, the organization, and the salesperson, but unfortunately they are usually a disaster. And that is a huge miss because they don't have to be the embarrassing or at least disappointing sales calls that they usually are.

Now we don't want to appear negative. I'm sure that you have visited many customers with your salespeople and been impressed with those meetings. If you are a salesperson there is no doubt that you have enjoyed many successful joint call experiences. And if these calls were thought through beforehand and planned effectively, you probably met or exceeded your expectations. We have heard many reports of successful team calls to customers and prospects. Not all joint calls are predestined to fail. But we know after researching this for almost twenty years that most joint sales calls prove to be disappointing and too many turn out to do more harm than good. If those of you on the sales side don't buy that, just ask your customers to tell you how they perceive most of the joint calls they experience. You'll be amazed.

It's all about the Process

So what's the problem? It comes down primarily to the lack of understanding of *process*. That's right process. Any interaction among people consists of two components—the content and the process. *Content* is the "what" part of the interaction. It refers to things like our ideas, our questions, our recommendations, our perspectives, our suggestions, and our insights. And quite frankly, most of us do quite well with the content. Whether it's a meeting, a strategy session, a creative session a planning meeting, or a sales call, when it comes to the content we tend to do pretty good work--sometimes even brilliant work—though in meeting situations that is usually the exception and not the rule.

It is the process stuff that gets us in trouble. Process refers to the “how’ part of the meeting. How we listen, how we treat ideas, how we ask questions, how we share the air time, how open we are to new approaches, how we manage time, how we stay focused and even how much fun we have are all process components. Our tendency to ignore process is the primary reason that meetings fail. And that is why so many joint sales calls prove to be huge disappointments.

Enter the Facilitator

For decades, whenever appropriate, groups have used facilitators to manage the process component of their meetings. Anybody reading this has been in a meeting that was facilitated by someone designated for that assignment. It doesn’t happen all the time for obvious reasons and it is not a luxury (or expense) we can often justify. But when someone is there to play that role and perform menial tasks like watching the time, keeping notes, as well as sophisticated tasks like keeping the group on track, protecting ideas, managing conflict, it has to be a better meeting. Problem solving meetings often use facilitators. As figure one suggests, three roles emerge in a problem-solving meeting: the problem owner, the participants and the facilitator.

Internal Meetings

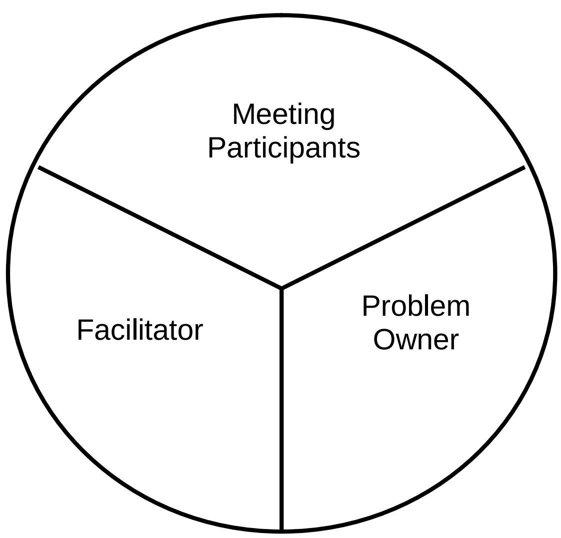

Figure One

These same roles emerge in selling situations. After all, the sales call is a meeting. The customer is ideally treated as the problem owner. He or she is the one who has a problem to be solved, an opportunity to be investigated, or at least a need to be addressed. The salesperson needs to play the role of the facilitator. Not in the classical sense, but this is clearly the person who manages the meeting and in essence controls the sales call. Anyone else who joins him or her as a resource is there to help in any way they can, but it is the salesperson who needs to run the show.

External Meetings

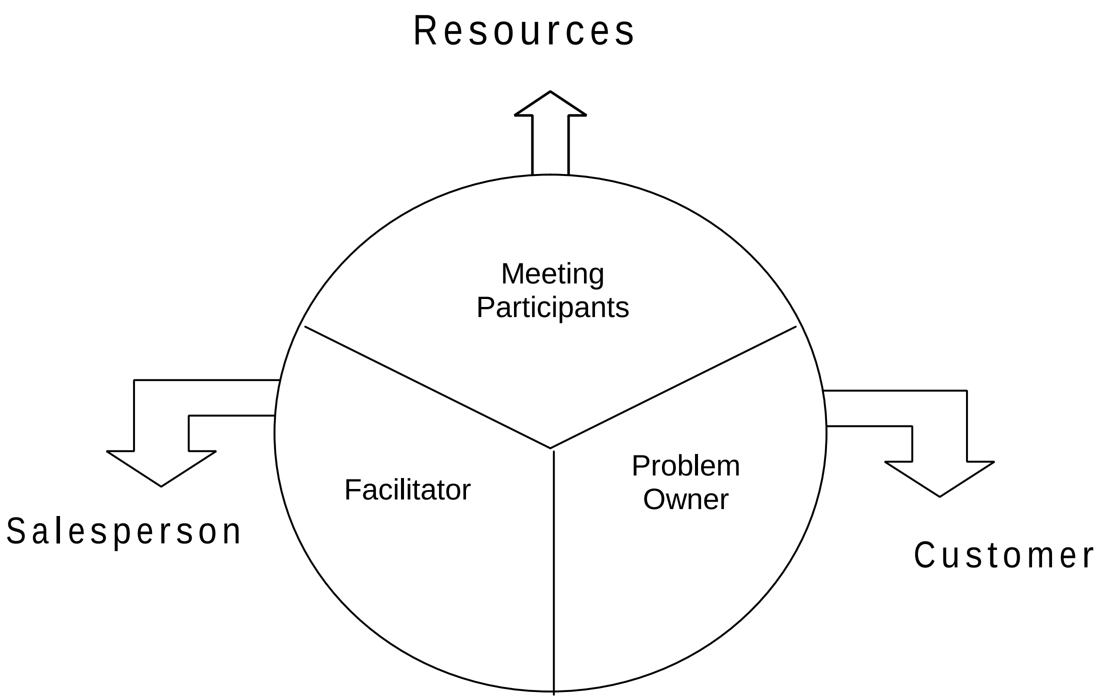

Figure Two

We believe that if the boss, a manager, a peer, or even the CEO is traveling with the salesperson, this critical rule applies—the salesperson is in charge. Theoretically, everyone in the room on the sales side is working for the salesperson when they are face to face with one of her accounts. If anyone takes over, it disempowers that person and sends a terrible message to the customer about the confidence others have in his ability to manage the relationship.

Unfortunately it is easier to say than do and managers tend to dominate all the time. It is one of the primary reasons why joint sales calls so rarely reach their potential.

The role of the salesperson

Many organizations have adopted the consultative approach to selling. This approach does many things including treating the sales call as a *meeting*. The salesperson runs the meeting. She establishes the climate and makes sure everybody is comfortable. He makes sure that everybody knows who's who. You would be surprised to hear how often people sit through entire sales calls without knowing precisely who they are talking to. Asking each person to introduce themselves, explain their role in the organization and express what they hope to accomplish is all part of *positioning the meeting* which is the first phase of the consultative selling model. (See figure three).

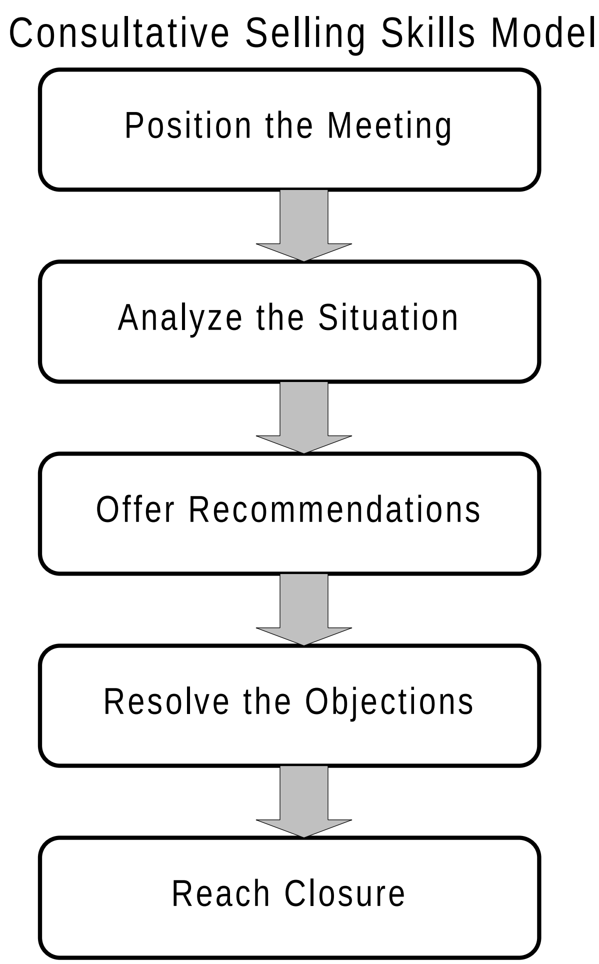

Figure Three

Analyzing the Customer's Situation

Since there are different phases in this sales process, there is a need to transition from one phase to the next. The salesperson is the one responsible for this. For example, it is the salesperson who makes the decision to move from positioning to what we call *situation analysis.* This is Phase Two of the Consultative Selling Skills process. Situation Analysis is a more sophisticated way of learning about the customer's needs, problems, worries, issues aspirations, goals, threats and concerns. Questioning and listening are, of course, the tireless skills that need to be used here, and with careful orchestration and effective planning the salesperson will ensure that his team members are asking the right questions in a thoughtful, non threatening way. A great way to use resources is to have them ask the questions that the salesperson may be reluctant to ask or should have asked long ago. Who makes he decisions, what is the budget, what are the decision making criteria, who else are they talking to, how they feel about their current relationships, and how they feel about us are the kinds of questions that resources could ask with less fear of buyer reaction than if the salesperson was asking those questions. If the customer does get a bit annoyed, the resource won't be back for a while, but the salesperson will and he or she will benefit from the answers as they escape the customer's wrath.

Hopefully everybody is listening at 112%. But when the salesperson decides the interrogation must cease, it is up to her to review the needs. Yes, it is up to her and nobody else. This is a key transition as the meeting will either end at this point for a future presentation or it is now time to present. The salesperson reviews his understanding of the needs and *then* turns to the resources to see of they have other perspectives based on what they heard and what they learned. This is a key moment in the sales process and the right person—the salesperson-- is the one who takes control.

Offering Recommendations

When it is time to present, or as we prefer to say, *offer recommendations*, the resources can play a key role. This is phase three of the consultative selling process. After all if you're bringing subject matter experts to visit your customer, you should be smart enough to defer to them when it is time to tell your story. The salesperson reviews the needs, but the specialists play a key role in making recommendations. It would be silly to bring in subject matter experts and not include them in the presentation. The salesperson can certainly participate, but she needs to use those resources.

One thing the salesperson needs to do is to put his guests "on notice." What I mean by that is the need to give the resource some indication that you'll be calling on them. For example if a customer asks you a question and you want someone else to answer, say something like "Fred knows a lot more about that than me, but before I defer to him let me say this…" Fred will know he is about to be heard from and will have a few seconds to get his act together. Once I called on someone to answer a question without warning suddenly realizing that he hadn't heard a word the customer said for several minutes. His answer was pathetic. It made us all look lousy. It will never happen to me again and you can avoid it as well. (I miss Andy. He was really a nice guy.) Those joint calls can have dire consequences.

Resolving Objections

Once the presenting is completed, enter the salesperson to manage the next transition. Customers will almost always object, even when they have the inclination to buy, and it is up to the salesperson to manage the objection resolution process which is phase four of the consultative selling process. The transition statement here is very straightforward, just a simple request for feedback like, "how does that sound" or "what do you think" or "tell us your reaction." The salesperson does this so that when the customer does object, he or she will be in a position to manage the objection resolution phase. See figure four.

Resolving Objections Model

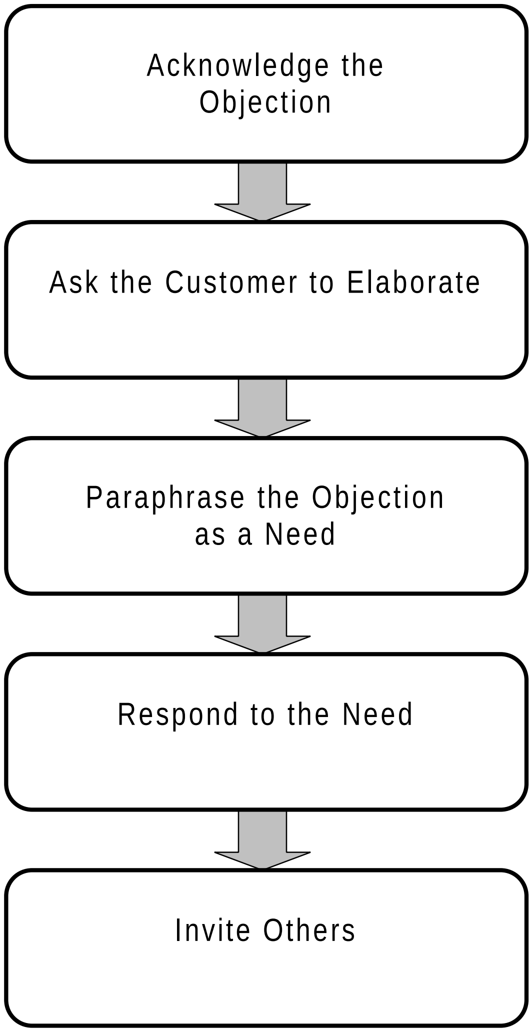

Figure Four

If ever there is a time to maximize the value of the joint sales call, it's when you find yourself managing resistance. Resources can play a significant role in helping the salesperson resolve whatever issues have been raised. The model introduced in figure four suggests that there are five key steps to objection resolution. First you acknowledge what the customer has said. That does not mean you agree with it, you simply let the buyer know that you heard what was said and respect their point of view. This is usually the responsibility of the salesperson. Next you ask the customer to say more. The tendency, of course, for most of us is to become defensive or even aggressive. Bad form. If the customer is encouraged to elaborate, then and only then will you really understand the objection. This can be done by both the salesperson and the resources and care must be taken not to turn this into a heavy handed interrogation.

Objections as Unfulfilled Needs

Step three in resolving objections is the key step as the intent is to transform the objection into a need. Most objections are really *unfulfilled needs* and the trained salesperson or sales team will do what they can to "reframe" the objection into a need. If the price is too high, the need could be to justify the cost or to see the value. If what you proposed seems like what they already have, the need could be to understand the differences. If the objection is that they feel loyal to their current provider, the need could be to see why it is in their interest to add another supplier. Or even if the objection is as challenging as the old "we had a bad experience with you guys in the past," the need could be to feel confident in our ability to deliver today. Turning objections into needs is the key to objection resolution.

As one member of the team encourages the customer to elaborate, the others can be thinking about how to reframe it, which will make it easier to address. It is a difficult skill, but it can be learned, and with thoughtful planning the team can do a marvelous job in managing resistance.

Surprisingly, the answer to the objection is the easy part. Most people know the answers to the issues their customers raise. It's predisposing the customer to *hear* the answer that creates the difficulty. That is why we suggest that the salesperson call upon the best resource to address it. It could be the salesperson, or it could be whoever the salesperson selects. Again a warning can help: "So it sounds like you need to feel comfortable about the compatibility of the new system with your existing process, is that right? Well, Pamela is here to explain how we can deal with that and in just a minute I'll ask her to respond. But first I need to know of there is anything else you want to say about it." Thirty seconds later Pamela chimes in with a brilliant answer and hopefully the objection will be resolved.

The final step in the resolving objection process is inviting the customer to raise any others they might have, which ensures that you haven't missed anything. Like all the transitions the salesperson is the one to initiate it.

Time to Close

Closing belongs to the salesperson. Whether it's the "Big C" (closing the deal) or the "little c" (getting specific next steps), that will always belong to the salesperson. The day of bringing in the heavyweights as closers is as passé as Willy Loman. If there are two people there or twenty, when its time to seek commitment, it falls in the lap of the salesperson. After all, that is the person who made it all happen. It is their job to seek closure.

Plan and Plan Again

We know planning isn't cool. And we know that rehearsing is downright nerdy. But those who do it and do it well will leave their competitors in the dust. A joint sales call that is conducted on the fly without effective planning is an incredible waste of time, money and energy.

Everyone needs to know what the objectives are. They need to know as much about the customer as possible. They need to know who will be at the meeting and why. They need to know the predispositions and the inclinations. And they need to show up with a good, solid understanding of the account.

Who does what

From an execution standpoint, everyone needs to know who will facilitate and hopefully that will be the salesperson. They need to know what needs are understood and what has to be determined. They need to know what questions to ask, how to ask them and who should ask what. If presenting is on the table, it better be clear as to who will talk about what and how to distribute presentation time to everyone.

Anticipate objections beforehand and decide who will seek elaboration and how they will do it. Discuss how you will reframe those objections and strategize about your responses. And of course think about who will be best prepared to provide the answer.

Too many sales teams do “elevator planning,” that is they plan the sales call in the elevator on the way to the customer’s office. What a foolish thing to do. With so much on the line, effective planning is critical.

A final thought

When planned well and facilitated effectively, joint sales calls can become a work of art. The key is to make thoughtful decisions about how to involve everyone and how to manage the process of the meeting. You and your colleagues have the brain power to do whatever you want to do. That is the content piece. It’s the process that never seems to get the attention it deserves.

If you have a salesperson who thinks of him or herself as a facilitator who is using the resources available as effectively as possible to help the customer accomplish something then the sales call can reach new levels. Remember **it’s all about the customer,** and if the team can effectively uncover their needs, problems, issues and worries, they will prove that they can add value that the competitors can’t, and in doing so clearly differentiate themselves. All everyone talks about these days is being perceived as a business partner. Using the team effectively in front of the customer is a living example of the potential of partnership and the added value it can bring to any relationship. That’s why making effective joint sales calls provides every organization with such an extraordinary opportunity to prove just how powerful and unique they are.