



The Baron
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**"Let's Talk
Selling"**

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About this issue...

Dear Friends and Colleagues:

As we reach the midpoint of 2004, we hope that this newsletter finds you in good health, positive spirits and enjoying robust business. We find that things continue to improve, but the most common concern we hear from our client base is that customers are still tentative, they aren't taking risks and too many are playing *not to lose* as opposed to playing *to win*. We hope that this will eventually improve.

This newsletter talks about one of our favorite subjects—the joint sales call. It's a potentially great opportunity

when you bring resources to visit a customer. Unfortunately, too often that opportunity falls short of this potential. And with that in mind, we'd like to review with you some of the principles associated with the joint sales call.

I hope you enjoy it. Let us know. We always like hearing from you.

Very truly yours,

Eric R. Baron

Joint Sales Calls

If the expense and time pressure issues weren't so pervasive, we'd recommend to our clients that *every sales call should be a joint call*.

Joint sales calls present us with so many opportunities. We can demonstrate the quality of our people. We can gain different perspectives as to the needs and opportunities of the clients. We can build upon each others' ideas. We can demonstrate our com-

mitment to the account. And we can once again show how we are different from the competition.

Yet in spite of all this, most joint sales calls rarely reach their potential. Most result in missed opportunities. Quite frankly, most joint sales calls are very disappointing.

The question, of course, is why? Why is it that what could be a work of art





Joint Sales Calls- cont'd



....it's what you do *before-hand* that drives success.

typically turns out to be a flop? Why is it that when one plus one plus one could have equaled five, too often it becomes minus two?

There are, in our opinion, four specific reasons.

1. ***Lack of planning.***
2. ***Not having a 'facilitator.'***
3. ***Not knowing who will do what.***
4. ***Missing the chance to debrief.***

1. The Planning Issue

Like everything else, it's what you do beforehand that drives success. We find that too many people just don't take the time to plan the call before the visit and that virtually none actually *rehearse* or even discuss in detail what they'll do.

Knowing as much as we can about the client, clarifying your objectives, determining who will do what, thinking about which questions to ask and how to ask the tough ones, anticipating possible objections are all among the things the teams needs to anticipate.

And rehearsing, though not 'cool,' is critical. If it's a big opportunity,

invest some time and rehearse. The best actors, actresses, dancers, athletes and politicians rehearse and practice. Why can't sales teams? All it does is make you better.

2. The Importance of the Facilitator

Internal meetings are always enhanced with the help of a facilitator. In problem-solving meetings in particular, the problem owner will assign a facilitator to help keep the meeting on track, ensure that everybody participates, manage obstacles, clarify next steps, and make sure that all those process tidbits that keep meetings from reaching their potential are properly managed.

Generally, in joint calls, someone needs to facilitate, too. Usually it's the salesperson or the person closest to the account. If salespeople think of themselves as facilitators, they'll run the meetings. It's their job to make sure the client gets what he or she wants. It's up to the facilitator to make sure everyone participates, and when. It's the facilitator's job to keep the meetings on track. And it's the facilitator who opens and closes the meetings.

If the boss is there, the boss's boss, or even if a power figure is there, the salesperson still needs to run the meeting. *If the boss takes over, everyone will pay a price, particularly the salesperson, who will lose credibility in the customer's mind.* Yes, make sure the boss participates actively. The client wants to hear from him/her— but don't ever let the boss take over unless there's an awfully good reason to do so.

3. Who Does What

Part of the planning focuses on who will do what. But too often opportunities are missed because it's unclear. Each participant from the sales team needs to know what his or her job is. Use those resources to ask questions you should have already asked or you are uncomfortable asking; use those subject matter experts to give great presentations. Use your team members to help resolve the inevitable objections that come up. Thinking about who will do what, when, and how they will do it always results in a more successful meeting.

When in doubt, leave it up to the salesperson. When a question comes up, he or she can answer



*Internal meetings are always enhanced with the help of a **facilitator**...Generally, in joint calls, someone needs to facilitate, too.*



Joint Sales Calls- cont'd

it or direct it to the appropriate team member. ("I think Sam is best suited for that...") Sometimes you'll want to give that person fair warning ("...in just a minute I'll ask Susan to add her thoughts, but first let me give my perspective...")

The key is to make sure that everyone is well prepared, everyone knows what they are supposed to do, everyone understands what were trying to accomplish and everyone knows that they can count on the facilitator (usually the salesperson) to get them involved.

4. The Debrief

If planning is the critical piece of this process, debriefing is a close second. Every joint call should be followed by a formal debrief session. If it doesn't happen in person for logistical reasons, do it by phone. But do it.

Don't overcomplicate the process. Ask yourselves what went well and be specific, so you are sure to do it again. Then explore what you can do differently next time and exactly what steps you'll take to be more effective.

Don't point fingers. It's not a time to blame. This

is a chance to step back, ask yourself how it went, make sure you capture what worked and spend some time figuring out how to be even better.

When the planning is done well, when team members understand their roles, when everyone knows what is expected

of them and how to contribute, and the debrief sessions are productive, joint sales calls can become works of art. It's a wonderful thing to see and it is very much within our grasp. It's just a matter of putting in the time and using your resources as effectively as you can.



*If planning is the critical piece of this process, then **debriefing** is a close second.*

<u>Activity</u>	<u>Who's Involved</u>
<u>Before the call</u>	
Setting the objectives-	Salesperson (facilitator)
Running the planning meeting-	Salesperson (facilitator)
Participating in the planning meeting-	All
Offering ideas-	All
<u>During the call</u>	
Rapport building-	All
Introductions-	Salesperson (facilitator)
Confirming objectives-	Salesperson (facilitator)
Asking questions-	All
Listening for needs-	All
Review needs-	Salesperson (facilitator)
Offering recommendations-	Designated, as appropriate
Resolving objections-	All
Closing the sale-	Salesperson (facilitator)
Getting next step-	Salesperson (facilitator)
<u>Debrief</u>	
Setting it up-	Salesperson (facilitator)
Participation-	All
Sharing perspectives-	All



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Who We Are:

The Baron Group is a consulting firm that researches and teaches the skills involved in the sales process, the sales management process and problem solving. Our primary focus is on the role of the salesperson as a problem solving resource to his or her clients. The salespeople who can help their clients solve their business problems by combining industry and product knowledge with proven problem solving skills will clearly become valued-added resources to their customers.

We develop programs customized to your needs-- creating a uniquely effective sales process for your organization. We then provide the required training for your salespeople, sales managers and other professional colleagues.

◆ OPEN REGISTRATION PROGRAMS IN 2004 ◆

New in 2004: The Baron Group now offers four Open Registration Programs, held at our Westport, Connecticut training facility and available to individual participants on a first come, first served basis. The diversity of the companies and industries represented in these programs greatly broadens perspectives gained in the learning situation— especially in classroom dialogue and role-play activities. ***Visit our website for details.*** Remainder 2004 training dates:

- **Consultative Selling (2 days)- August 26-27, October 28-29, December 2-3**
- **Coaching for Improved Performance (2 days)- August 10-11, November 2-3**
- **Option Fundamentals & Applications (1 day)- September 21, November 29**
- **Yields, Yield Curves, & Sales Implications for the Fixed Income Markets (1 day)- July 22, November 22**

The first two offerings are our premier selling skills process programs; the last two offerings represent the inaugural programs in our new **Financial Products and Markets Training** segment. When contacting us (see below) regarding FPMT training, ask for **John Lundeen**.

For more information, fill out the form below and fax this page to: 203-221-8411, or email us at: info@barongroup.com

Name _____ Company _____

Title _____ Email _____

Address _____ State _____ ZIP _____

Phone _____ Call Me Send me information on:

Consultative Selling Coaching Yields & Yield Curves Options Negotiation

Innovative Team Selling Sales Action Planning Problem-Solving Meeting Facilitation