The Baron Group, Inc.

Passing the Selling Baton

Handling the Turnover Call

by Eric Baron

The turnover call. It's that infamous sales call when an account representative who is leaving a territory introduces the person who is replacing him or her to the customer.

Usually there is much small talk with little business accomplished. That is unfortunate because that particular call may be one of the most significant opportunities a salesperson encounters during his relationship with an account.

The turnover call is probably the last time the former salesperson will see the account. At the same time, the new representative is there, eager to start with a clean slate and prepared to learn all about the account and to be as accommodating as possible. So it is a big opportunity for the former salesperson to take a few risks to gain a better understanding of the accounts needs and obtain new information.

It's a chance for him to ask questions and share perspectives that he has previously resisted, while the new salesperson observes and absorbs the information. If the old representative goes a bit too far in the eyes of the buyer (*"Come on, John, I've been trying to find out for years who your major supplier is. Why don't you tell me today?"*), that boldness will be associated with him, not the new representative. Yet, the new account rep gets the benefit of the answer without blame for asking a brash question.

Unfortunately, the reality is that turnover calls are rarely handled properly. Working with many new salespeople, I have learned that the typical turnover call finds the old salesperson and the account people talking about old times, sharing war stories, wishing each other well, and saying goodbye.

The new salesperson rarely participates, only occasionally hearing anything of substance on the business relationship. lie or she gets just a quick introduction before sitting on the sidelines, having little or no chance to make much of an impression. As one young salesperson told me, *"It was like watching a tennis match. The two of them bantered back and forth while I watched. I didn't get a thing out of it, felt somewhat intimidated, and was quite bored- I almost would have preferred to start my relationship with a cold call by myself"*

TRICKY TRANSFERS

Regardless of what business you're in-- whether selling office supplies, raw materials or advertising space-- as the manager of that business, you know that account transfers are something to avoid, for logical reasons. There is a loss of momentum when one person leaves and a new one arrives. It takes time to establish credibility, to build rapport and to understand the customer's needs. Commitments, obligations, even promises made by the customer to the old representative might not mean a thing once he or she is gone. Product evaluations, proposals of various sorts, quotations under consideration, third party possibilities and other programs that are in progress always seem to slow down when the account responsibility changes hands.

But, despite the negative aspects of account transfers, there are many positives to it as well, the most opportunistic one being the well-conducted turnover call.

Consider, for example, the value of asking a good prospect, in the presence of the new representative, why your company hasn't succeeded with him:

"John, we've been working hard to get a piece of your business for years now, with little or no success. I've always felt we've been available when called upon and I'd like to think we have a good personal relationship. Yet, we've never received any business. So, do you think for Nancy's benefit you could explain that the problem has been and what she might do differently to help us participate in your program?"

Or, if you have been successful with an account, there's no danger in asking why, again for the benefit of the new representative:

"John, we certainly have enjoyed your business these last few years and hope to continue to supply you with our product. I think it would be helpful to Nancy if you could explain

what you expect from us as your supplier and perhaps what she might do differently to further improve our relationship."

Unfortunately, situations like those rarely occur during turnover calls. Asking such questions opens the door for negative feedback which most of us prefer to avoid, especially in front of a peer or new replacement. Yet, if trust exists between the new and the former reps and if they both recognize the value of taking such a risk, such questions may he worth asking. Often, the old salesperson ends up hearing lots of nice things about himself anyway.

As for the new representative, it's probably beneficial for him or her to participate actively in the call. Research on first impressions and how long they last shows that one has about four to five minutes to make a first impression before others make judgments.

Perhaps the new rep can discuss a new product or campaign, or mention the success of the product elsewhere. A little preparation to show he or she knows something about the account's business won't hurt And a personal introduction from the former salesperson can highlight some of the new rep's credentials in a favorable way:

"John, I'm pleased that Nancy will be working with you when I leave. She's a chemical engineer and has been involved in this industry for about six years. Previously, she was on the East Coast he/ping to develop this new business.'

Or, if you are introducing a rookie:

"John, we are delighted to have Nancy with us. She has just finished an extensive training program and she's probably more technically proficient than I am. Nancy's background is…"

TURNOVER GUIDELINES

Leaving latitude for personal preferences and style differences, there are some specific guidelines essential for the successful turnover call.

- The former salesperson should control any joint call and the turnover call in particular. The new representative must know that the current representative can take control at any time during the call, because he is the one individual who knows everyone involved and can best decide what decision to make. A planning meeting beforehand to agree upon a course of action will ensure that that happens.

- The new representative should handle any follow up work resulting from the turnover call. Putting responsibility there makes sure that the job will be done, giving the new representative a chance to make a good impression if the work is done promptly and efficiently. Lame duck salespeople tend to put most of their energy into their new assignments.

- Make the turnover call a win/win situation. It is an opportunity for the buyer to express his needs, explain what his company expects and let you know what he has liked or disliked about previous sales calls and buying experiences. The new representative can be introduced in a favorable light, hear first hand what commitments exist and what to expect, and most important, learn what the customer needs and wants from his supplier. The former salesperson gains feedback on his efforts and contributes to the continued growth of the territory he has managed in the past.

Unfortunately, we often learn about the value of turnover calls the hard way. One new representative for a computer company, for example, learned that her product was successfully evaluated by the buyer, yet still not used. Thinking it would be, she explained to the buyer that she understood she would get the order if the product performed well. When the buyer said no such promise had been made, the new representative realized with chagrin that she had heard about it from the former rep in the car on the way to the call, not in front of the customer himself.

Had the former rep confirmed the promise in front of the buyer, the new rep would have had something to reference. With that in mind on all her future turnover calls, she made sure that existing commitments were discussed in the customer's presence.

The rules for the departing rep are simple. Involve the new representative in the call. Discuss why your company has or has not been successful. Determine the expectations of the buyer. Solicit feedback regarding your performance in the past. Discuss existing commitments and Promises during the call. And, as departing rep, always control the call.

One other important ground rule for the old representative never introduce the new salesperson as "my replacement." Nobody replaces you. Someone takes over a new territory and does it his or her own unique way.