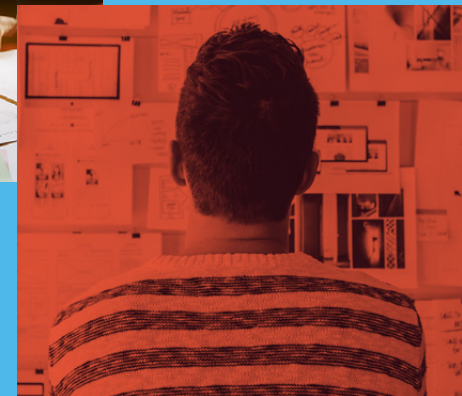


The Modern Sales Leader's Guide to Sales Process & Sales Methodology:

Sales Structures You Can't Live Without



By Amy Franko



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For questions or to book Amy Franko for your next event, please refer to the contact information at the back of the eBook.

www.amyfranko.com



Welcome to AmyFranko.com and the eBook that all modern sales leaders and sales professionals need today. Selling strategically is the only way to differentiate yourself as you help your clients navigate their most important business decisions.

This eBook covers the two sales structures you can't live without: sales process and sales methodology. With them you will far exceed your sales goals. Without them, your sales efforts become disconnected and diluted, leading to missed opportunities.

Based on my Strategic Selling Method, you'll take away the innovative ideas you need to develop and implement these structures in your territory, or across your sales organization or firm.

To discuss ways to partner on your next strategic initiative, sales program, or keynote event, please refer to the back of this eBook for contact information. I look forward having you in our community of sellers and leaders.

Amy Franko
Founder & CEO
Amy Franko Associates

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Selling strategically ensures that your strategy and tactics are aligned— and will help your team create the greatest odds of sales success.

What it means to sell strategically

Strategy is about setting yourself apart from the competition.

When we talk about selling strategically, we can set ourselves apart by looking at the big picture view of our client base or sales territory, while simultaneously managing the details needed to move client opportunities forward.

At the big picture view, do you know where your biggest client opportunities are? Do you know where your biggest prospect opportunities are? And do you know what the biggest risks are to your success in your client base or sales territory?

Then, taking a more tactical view, do you know what the individual steps and actions are that you need to execute on a weekly, a monthly, and quarterly basis?

It's an important balancing act.

Sales Training Methodology: Your Key to Sales Success

There are certain phrases I'm hearing my clients repeat more often when it comes to sales success. They want to be more data driven. They want to use information and not only instinct. They want better structure. They talk often of needing stronger sales culture.

A recent Harvard Business Review article, "Reengineering the Recruitment Process," shares some eye-opening results from a recent Gartner study that should change the way organizations view their sales training strategy. It shares: "A survey of 3,500 managers found that only 29% of new hires have all of the skills required for their current roles, let alone future ones. The research finds that in key functions such as finance, IT, and sales, positions filled today will require up to 10 new skills within 18 months."

Much of the solution to these challenges lies in having a sales training methodology and a sales process.

Sales training and sales coaching investments can then be more effective and impactful for your teams.

SALES METHODOLOGY & SALES PROCESS DEFINED

Sales methodology and sales process often get interchanged. In reality they're two different things but they're closely related.

Sales process is like a staircase. It's a linear, stepped approach to moving an opportunity through the sales pipeline. There are often points where products or services get forecasted based on where the opportunity is in the pipeline and win probability. Your sales process might include steps like:

- Lead generated
- Opportunity identified
- Opportunity qualified
- Demo or proposal in process
- Conditional agreement and negotiation
- Opportunity won or lost



Sales methodology is like a chess match. These are a variety of things you can choose from – like strategy, tactics, and skills – to help you at any given time. They are designed to support your sales process and don't necessarily follow a specific step-by-step pattern. Some examples could include mapping your client's buying process, your approach to solutioning a sales proposal, sales discovery conversations, or determining the right decision makers then strategizing on how to build relationships. These all support a successful sales outcome, but you may draw on them at different times.





Key Elements of Strategic Selling

There are five elements I see as critical to earning new business and growing your client base:



This eBook will dive into each one in more depth and provide you with some ways to actively build them into your sales activities.

KEY ELEMENTS OF STRATEGIC SELLING

Element 1: Growth Mindset



Growth Mindset

According to research by *Scripted*, 44 percent of salespeople give up after one follow-up. Just one! In fact, the average salesperson only makes two follow-up attempts to reach a prospect, according to *Sirius Decisions*. That tells me we've got a lot of work to do in terms of mindset.

One tool that will serve you better than any, especially in high-value, significant sales opportunities. That tool is the growth mindset, and it sets the stage for every activity, big or small, that we undertake on the path to sales success.

At a basic level, what we deeply believe about ourselves and how we view ourselves has a tremendous capacity to write the pages of our success. According to research by Carol Dweck, those who embrace a growth mindset tend to believe that a person's intelligence has the capacity to grow, and therefore view experiences, feedback, and challenges as learning opportunities on the path to mastery. They don't view them as failure, or as an indication that they aren't smart.

Those who tend toward a fixed mindset take the opposite view, and therefore are often less willing to take on new challenges for fear of looking less-than-intelligent to the outside world. Because they see challenges and obstacles as things to be feared and avoided, they will steer clear of risks. Anything short of the "right answer" is a failure.

PRACTICAL WAYS TO CULTIVATE A GROWTH MINDSET

I'm sharing several of the tools and techniques that have helped me over time to spend more time in growth mindset, to remain resilient in an ever more challenging sales world, and to be ready for the next sales opportunity. To help you to decide which tools may work best for you, I've organized them into some key categories.

8 Tips to Cultivate a Growth Mindset



ROUTINES

1. Create a set morning and end-of-day routine. While no day is exactly the same, the one thing my days have in common is a set morning routine for reading or writing, working out, or quiet time before the day begins. At the end of the day, it's creating my priorities for the next day and shutting down the technology.

2. Invest the first part of the workday on a top priority that moves you forward, and protect your time. This tip comes from productivity expert Kevin Kruse, who interviewed over 200 ultra-productive business leaders, entrepreneurs, athletes, and students. When I accomplish this, I find myself better able to stay in the right frame of mind. When I waste time in the morning or don't make forward progress on this one, I feel my attitude dragging and it takes significant mental and emotional effort to restore it. After a particularly rough day, I remind myself to get back at it tomorrow with something productive and meaningful first thing in the morning. For more on sales productivity, watch this webinar.

LIFELONG LEARNING

3. Invest in outside perspective. I have a professional coach, someone who not only holds me accountable to my goals and dreams, but helps me to keep perspective when things aren't going according to plan. My coach also helps me to identify emotional triggers in challenging situations. By shining a light on why I might react the way that I do in a particular situation, I can take a step back and see what's working and what's not.

4. Develop learning agility. Do you know someone who picks things up quickly no matter how complex the content or situation? That person is likely "learning agile," and their brain can organize, chunk, and prioritize information in ways that help them to quickly master a subject. The good news is that learning agility can be developed, and I highly recommend Agile Selling from Jill Konrath on this topic.

THE SALES HABIT OF WELL-BEING

5. Get sleep. There is ample research out there supporting direct effect that sleep has on our mindset and well-being. When the brain is even moderately sleep deprived, our mental and emotional energies are negatively impacted. We're more irritable, and less able to pull ourselves out of the funk of negative outcomes. Those who are well-rested are better able to pull themselves back to a neutral or positive state more quickly and easily.

6. Exercise. Like sleep and meditation, exercise actually changes the brain's chemistry and wiring over time. Our bodies are better able to handle the stressors of daily life, and we have the physical and mental strength needed to overcome challenges and obstacles. To make this more practical for me I keep my workouts to 30 minutes, and incorporate high-intensity interval training along with strength training. I also love to get outside into nature.

OUTWARD AND INWARD FOCUS

7. Practice gratitude. Conversely, taking time to reflect on what we're grateful for in our lives is like hitting the reset button on our frame of mind. I keep a daily journal, where at the end of each day, I jot down 3-5 things I'm grateful for in that day. Another side effect of this practice is helping me to stay more aware in the present moment and actually look for the small things that make me grateful.

8. Release the outcomes. This one isn't easy, at least not for me. When we invest our time and talents into something, it's easy (and understandable) to become attached to how it's all going to turn out. But, as it turns out, if we release the expectations of the outcomes and instead focus on what we're learning in the process, we improve our odds of getting to our desired outcomes and enjoying the journey much more.

KEY ELEMENTS OF STRATEGIC SELLING

Element 2: Advisory Intelligence

Advisory Intelligence

Advisory Intelligence is your depth of understanding about the client or industry vertical you're looking to grow. The more depth you have, the more you're able to step into the role of advisor. You want to be perceived as so valuable to the client that you are the clear choice, whether it's a net-new opportunity or a long-term client.

Stay current on trends. Being well-read and current on trends builds your opportunity intelligence and your advisory confidence. Trends to consider include industry, global, cultural, technological, product, consumer, political, and those specific to your expertise. This strategy not only helps you with intelligence about their business and industry, but it can also give you better conversational depth when you're building relationships within the client.

Understand the levers specifically impacting your clients and prospects.

Of the trends I just listed, which ones are most important to your clients and prospects right now? Those are the levers to pay closest attention to because they can signify opportunity. Additional levers impacting them are internal levers such as organizational challenges, key initiatives, financial results, and the current vision of top leadership.

Align your sales activities with their buying process. Can you pinpoint all the steps in a client's buying process? While there will be some commonalities from client to client, they will also have their nuances. For example, does a twist in the decision-making process take you by surprise? Are there multiple iterations of a proposal before it's final? Or maybe there are additional steps to take once a client agrees to work with you that you weren't aware of. When you know the nuances of their decision-making and buying processes, you can better align your activities to keep momentum.

Stay aware of trigger events. Trigger events have a shorter shelf life but are equally as impactful because they can accelerate the decision process. Trigger events are either internal or external and signify that a client may need to move from their current status quo. Status quo (or a non-decision) is a silent competitor to always be vigilant of — especially during these times of disruption where clients aren't necessarily looking to introduce additional change. Staying on top of triggering events can help you to take a leadership role with your prospects and clients, and they can open doors where you may not have been able to open them before. If you work in an organization with multiple service lines and breadth of experience, look for trigger events that aren't necessarily in your wheelhouse. This will help you to open doors to other areas of the client's business. If they're a current client, this approach will help you to better cross-sell your firm's services.

Element 3: High-Impact Relationships



High-Impact Relationships

Your ability to build relationships is foundational to your success with client growth.

We're in a world extremely connected through technology. We can find virtually anyone and begin to build a picture of the organization in a few keystrokes. But sellers and business developers often mistake connections for relationships. Or they build relationships only where they're comfortable, whether that's with a certain department, role, or leadership level.

What are some specific ways you can be thinking differently about relationships and how you build them?

1. Map out the relationships you have for a specific opportunity. I do an exercise with clients where we build out their relationship ecosystems and buying roles in an opportunity. This is a more strategic approach because it will give you a bigger picture of strengths and gaps. I remember a sales opportunity where I lost a multi-million-dollar project because I was missing one key relationship group. Mapping your relationships doesn't need to be time-consuming; it will pay off by helping you accelerate progress and reduce risks in your opportunities.

2. Assess for gaps and get beyond the typical silos. You might be building relationships only where you're most comfortable. Your success will be in getting beyond your comfort level; you can do that by assessing and filling in relationship gaps. In mapping your relationships you'll see patterns. For example, you may see a pattern where you're selling only one product or solution to one type of role. You're siloed and likely missing many other relationships. This is especially important if your growth strategy includes expanding different products or services within your client base.

3. Build your strategic alliances. This one strategy has made a significant difference in both the quality of my relationships and the quality of the opportunities I'm able to create. Do you have alliances outside of your organization, with other providers serving like clients? A way to begin is by creating a list of the tangential providers who sell non-competitive products or solutions to your clients and verticals. From there you can assess which ones are the most promising and begin building those relationships.

4. Focus on deepening relationships with current clients. In the quest to always earn net-new clients, deepening relationships with current clients is often forgotten. But this can be the best source of continual, high-quality opportunities. One strategy is to create a list of your top ten clients and then create a relationship map for each one. See where you can uncover new relationships and new ways to serve that client. You'll amplify your success with a client where you already have trust and credibility.

5. Aim higher in the organization. You might be used to working in the middle of an organization, and in many cases that may be where your decision-makers are. But you can (and should) build awareness and relationships at the higher levels of an organization. Ways you might start this process include introductions on LinkedIn, sharing of research and insights that can improve their business, or a request for a higher-level leader to join your next account review or project meeting.

To get started, choose one of your top clients and begin working through at least one or two of these strategies with that client in mind. It will undoubtedly open more relationships and also opportunities to serve your client and win high-value business.



KEY ELEMENTS OF STRATEGIC SELLING

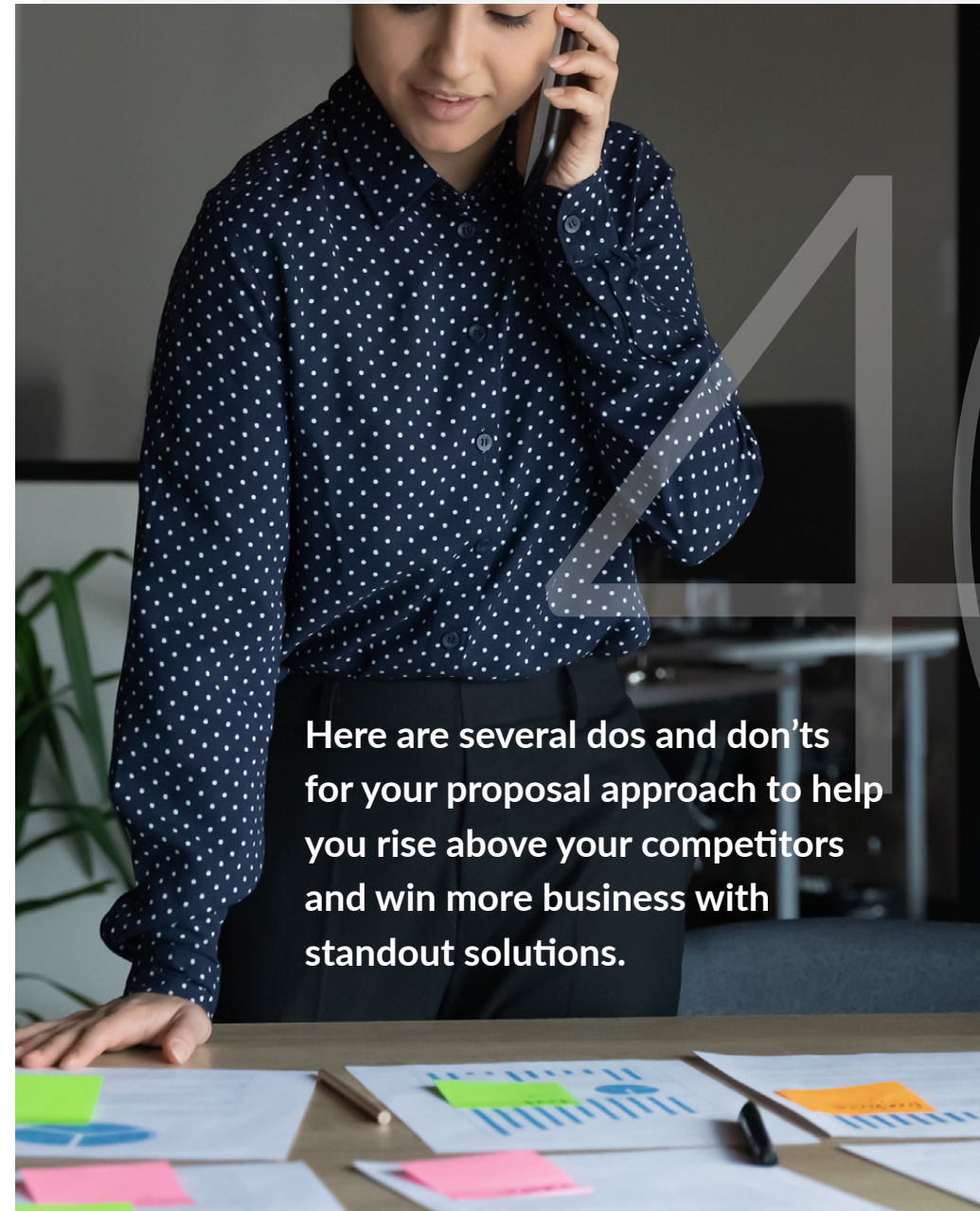
Element 4: Standout Solutions

Standout Solutions

Here's a question to consider: If you took the logo off your sales proposal, how would it look to your client? Would it stand out? Or would it look like your competitor's?

In competition, we often hear the importance of a "level playing field." But one place that term doesn't apply is in sales. Your sales process and sales proposal should aim to "uneven" the playing field. But too often, we don't stand out, we look just like our competitors in the eyes of the client.

Modern selling requires us to think beyond the basic features, benefits, and pricing data that is in most proposals. Sales proposals are an opportunity to take what you've learned about the client's business and position your product or service as the best solution to help them realize outcomes and value. Proposals are an opportunity to differentiate.



Here are several dos and don'ts for your proposal approach to help you rise above your competitors and win more business with standout solutions.



Standout Solutions

3 Sales Proposal Dos



DO

Uneven the playing field.

Your sales process and proposal should aim to uneven the playing field and set you apart from your competitors. Making the playing field uneven isn't about doing anything that lacks integrity. It's thinking differently, anticipating what a competitor might do, or paying attention to details. In one proposal situation I requested interviews with the decision makers and influencers. I was granted those interviews. My competitors never thought to make that request, and consequently I was better able to position outcomes and value – and win.

DO

Use the “Rule of 3.”

You will improve your odds of winning with three proposal options that build on one another. Too many option choices can introduce complexity that risks turning off the buyer. The Rule of 3 shows our ability to understand outcomes and value in the eyes of the buyer. When a buyer can't see and collaborate on a clear path forward, you will stall your momentum.

DO

Focus on outcomes and value.

Can every solution element of your proposal point to the outcomes and value and the client is looking to accomplish? If not, you'll need to revisit and revise. Know your goal for the proposal. In some cases, your goal is to close on that proposal and next steps. In others, you may be looking for collaboration, and the proposal is the natural progression. If you can keep to the true north of outcomes and value, before introducing solutions, you will create a standout proposal that wins.



Standout Solutions

3 Sales Proposal Don'ts

DON'T Make your sales proposal a resume of your firm's capabilities.

If you were to take the logo off your proposal, would it look like your competitor's? Sales proposals tend to be inwardly focused on us and our solutions, rather than outwardly focused on the client and what they want to most accomplish.

Instead, reverse the order of focus. Begin with the prospect's outcomes and the value created in getting to those outcomes. You'll accelerate trust, because your prospect or client will view you as their strategic problem solver. They'll clearly see that you understand their business and goals, and that your proposed solutions align with them.

DON'T Oversell and overcomplicate.

Richard Branson said, "Complexity is your enemy. Any fool can make something complicated. It is hard to make something simple." When you oversell and overcomplicate, you risk the decision being delayed. Or worse, you risk them sticking with the status quo and making no decision.

A strong proposal simplifies the complex, provides clarity, and tells the story in a concise way. Simplicity helps your prospects and clients see a clear path forward, giving them confidence that you're the one to help them get there. To avoid unnecessary complexity, make sure each element of your proposal clearly refers back to creating the client's outcomes and value.

DON'T Negotiate price as the first option.

Fee concessions should be used rarely and strategically.

The first option I recommend is to understand the motivation behind the request. You may ultimately need to negotiate the solution, and not simply the fees. If you're ever asked for a fee concession, or to quote a price on the spot, your first reaction should be to mentally stop. I might say something like, "I'd like to get your perspective in a little more detail, and then we can work through what our options might be."

KEY ELEMENTS OF STRATEGIC SELLING



Element 5: Closing & Creating Commitments

Closing & Creating Commitments

Closing a new sale is never the end of your sales process, but rather the beginning or continuation of your customer relationship. Sales closing is the skill that improves your deal velocity and helps you achieve your sales quota.

I find often that sellers and business developers don't have this skill mastered. Usually it's due to a combination of mindset and skillset. Sellers see closing as complex, intimidating, and even as something to avoid. I've also seen situations where closing a sale is treated as a linear action, and it's not built into the overall strategy. For example, it only becomes part of the conversation after a big presentation has taken place.

Developing your skills with the sales closing keeps opportunities from getting stuck in your pipeline, and it maximizes your sales. This article shares 3 Do's and 3 Don'ts when it comes to incorporating closing throughout your sales process.





Closing & Creating
Commitments

3 Sales Closing Do's

DO

Use Commitments as Data.

If you work backwards from a recent win or loss, pinpoint along the way where commitments were made (or weren't made). Commitments are the actions throughout your process that either move the relationship forward or stall it out. They are things like access to decision makers, discovery calls, document reviews, requests for information, presentation dates – anything that requires a commitment from you or the customer.

That will give you valuable data so you can fine tune your approach. There are data points in commitments that will show you where the customer was tracking with you, and where they weren't. The more knowledgeable you become with your deal process, the better you'll become at qualifying (or disqualifying) your opportunities.

DO

Ask the Right Questions at Each Stage of the Sales Process.

Sellers who can ask insightful (and thought-provoking) questions can uncover and close opportunities faster. Look at each stage of your sales process and determine the questions that need to be answered. One such stage is a qualifying customer's decision-making process. That means asking strategic and specific questions such as:

- Can you walk me through your decision-making process?
- Who else is involved in the process?
- What is your decision timeline?
- Is there a specific deadline or major event you're working toward?
- What are the most important criteria to keep in mind when you're considering new providers?

DO

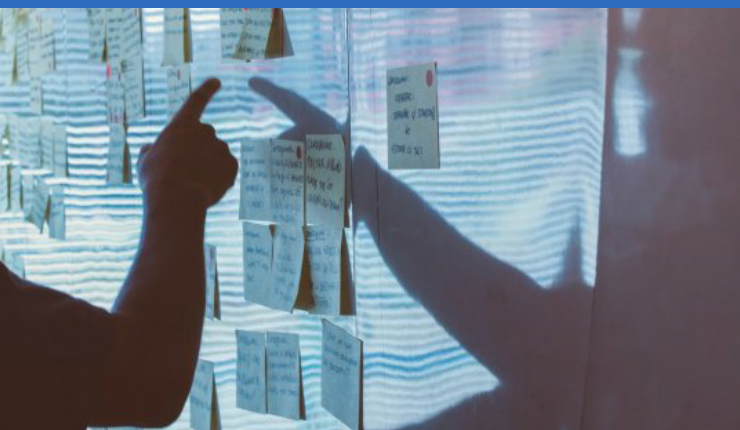
Have Access to the True Decision Maker(s).

This is a follow-up to the above. The only way you can close business is by having access to the right decision maker(s). When you hear the phrases "I need to involve X" or "we will make a recommendation to the board" you know right away that you don't have the true decision makers. Sometimes it takes a little sleuthing, and it can also take a conversation or two to get the full picture. You might ask questions like:

- Who are the key stakeholders in this initiative?
- How is the initiative being funded?
- Who owns the final decision to move forward?
- If we move forward, who would be interested in hearing about our progress and milestones?

Closing & Creating Commitments

3 Sales Closing Don'ts



DON'T Muddy the Waters.

Separate Selling, Negotiating, and Closing. Sometimes we muddy the waters between selling, negotiating, and closing. Each is its own part of the business development process. Trying to tackle them in one fell swoop is ineffective and dangerous.

Selling activities help you to learn about the client's business, build key relationships, and present solutions to help them meet their key outcomes. Selling activities help the client to recognize and connect to the value in working with you.

Negotiation begins when there is a genuine commitment from the client toward the conditional sale. You may be making adjustments to terms, to the solution, and you may be addressing key concerns.

Closing is when the client decides to take action, you finalize the contract, and then move forward to implementation. It's the beginning of the next steps of a long-term relationship.

DON'T Avoid Sales Barriers.

Objections are a constructive part of the sales process. When you know they are coming, you can be in the right frame of mind, and they won't throw you off. Think of them as concerns to work through, and this usually means the prospect is actively processing how you can work together. A sign of a good relationship is that your decision makers and influencers will actively tell you about concerns; they will sometimes have ideas on how to work through them so you can move forward.

You'll instill more confidence and trust if you seek objections upfront.

For example, you might ask:

- What are some challenges that might surface down the road?
- What potential barriers do I need to address to earn the business?
- How will we know that we've solved for the concern?
- Open ended questions encourage a productive conversation. The goal is to not create unnecessary barriers, but to earn trust and accelerate closing.



Closing & Creating Commitments

3 Sales Closing Don'ts



DON'T Avoid Directly Asking for the Sale.

You've qualified this opportunity, you're working with the right people, and you've presented a strong proposal. This is often where sellers pull back, but don't allow yourself to leave it to chance. Don't expect the prospect to get back to you. Now is the time to lead, and they have an expectation that you ask for the business even if they don't verbalize it.

If you don't make a professional and clear ask for the business, one of your competitors will. Or inertia may take over and create a non-decision.

Here are a few ways to lead with the ask:

- "Now that I've shared my recommendations, I'd like to get your perspective. What makes the most sense to talk about further?"
- "What would you like to see happen next?"
- "Based on what we've discussed, I'd recommend we start here. Are you ready to move forward with the next steps?"

With this skill, preparation breeds confidence. Your own self-confidence and confidence on the part of the prospect or client. You might have a trusted colleague or coach practice with you and provide feedback about your body language, voice and pace, and the clarity of your overall message. Clarity and confidence will win the day and help you keep momentum. Your clarity and confidence translate in the customer's mind that they are making the right choice in working with you.

To get started, prioritize and apply the closing strategies that are the best fit for your current opportunities. You'll create the momentum you need to earn the business and creating a lasting client relationship.

How to Implement with Your Current Sales Organizational Structure

1. Create a Center of Excellence. This isn't just for large organizations; mid-markets will equally benefit from this governance structure. This strategy can include a cross-section of sellers, sales leaders, and business units, with the goal of creating consistency across your structures. As this matures you may choose to bring in other areas like hiring and onboarding.

2. Integration and accountability are key. For example, when your sales process is integrated with your CRM, it will improve use rates, ensure your opportunities are more accurately tracked, and significantly improve your forecasting.

3. Assess team sales competencies and your organizational structure. Do your structures support growth? Where can you improve to create more significant improvement? How does your team measure against the sales competencies they need to sell successfully? I use a sales-specific assessment with my clients that gives them data to make better decisions around structures, skills, and team design.

4. Start with process first and keep it high level. You want your process to easily cover 80% of your opportunities, with integration into your CRM. Once you've confirmed your process, you can then align your sales methodology.



Your Next Step:

Let's Schedule a Conversation.

Would you like to take the guesswork out of designing your sales process and sales methodology? I can help. Please connect with me using the contact information at the back of this eBook.



About Amy Franko

The leading expert in modern sales strategies.





Amy Franko helps organizations to smartly accelerate their sales growth while also developing high-impact leaders.

A LinkedIn Top Sales Voice and leading sales strategist, Amy is known for her practical experience and action-oriented approach to working with her clients. Her unique approaches blend current research, new ideas, and relatable case studies that inspire innovative thinking and tangible action.

Amy built a highly successful sales career with global technology companies IBM and Lenovo. She then pivoted into entrepreneurship, launching a sales, leadership, and training consultancy that has worked with some of the world's most recognizable brands. Her experience in a wide range of B2B and entrepreneurial sales environments makes her uniquely qualified to advise sales organizations. In addition, she actively applies her passion for leadership as a Board Director and Chair for an internationally recognized organization, Girl Scouts.

Amy's best-seller, *The Modern Seller*, is a field guide of five next-generation capabilities that sales organizations can use to innovate and grow. Her expertise is widely shared on social networks and in respected publications like Top Sales World, Selling Power, Training Industry, and Fast Company . She has been interviewed on numerous high-profile sales and leadership podcasts.

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