

Phone Sales Outline & Script 2013

The Elements of the Call

- 1) Build Rapport and Break Preoccupation
- 2) Discovery
- 3) Credibility
- 4) Introduce a Profiles' Solution – Leverage Unique Strengths
- 5) Summarize – Key Win-Results
- 6) Proof, Action & Pricing
- 7) Summarize and Close to Single Sales Objective

Additional Training Resources

- Eight Things I Must Learn to Make a Sale
- Seven Critical Client Credibilities

NOTE – This outline and script borrows liberally from two books – The New Conceptual Selling and The New Strategic Selling – by Stephen Heiman and Diane Sanchez of Miller Heiman, Inc. - Warner Books

The Call

Collectively, what follows is more than would ever be covered in a single call. The intent is to provide the procedures and resources to marshal a prospect all the way through the selling process to a close. The preceding outline provides a framework for the call(s). What follows provides the substance.

1) BUILD RAPPORT AND BREAK PREOCCUPATION

NOTE – If at any time the prospect indicates now is not a good time to talk – *“Would love to spend 15-30 minutes addressing your interests. Can we schedule a date and time?”* If we end up setting an appointment - *“If I call on the agreed time (or date, if not time specific), and I get your voice mail, what would you like me to do, so we don’t end up playing phone tag?”*

It’s a good idea to at least visit the prospect’s web site prior to our call. We may frequently find a mission statement, objectives, annual report, employment opportunities, or executive quotes that are consistent with what we do as a company. We may also want to research them in Hoovers or OneSource. And it always helps to research in LinkedIn.

We are looking for anything by which we can personalize our relationship with the prospect and **establish commonalities**. Do you have the same acquaintances? Similar schooling or associations? If this is a referral, explore how they know the referrer and why they think the referrer thinks they might want to talk with you.

In your conversation, it is also a good idea to try and mirror the prospect: If they are more formal, you need to be more formal. If they are more casual, then you can be somewhat more casual.

You may be able to relate to the prospect through your industry knowledge, or through other means. **Example:** *“Thank you for contacting us. I see from your **web site** that your company is located in _____. Is that where I have reached you?”* (People enjoy talking about where they live or where they are from. It’s a good icebreaker. Anything that can personalize your relationship with the prospect is good, but if it is not work-related, be careful to not get too far afield.)

- *What does your company do?*
- *How long have you been with the company?*
- *How long have they been in business?*

- How did they learn of us? Through our marketing? Surfing web? Another client? Contact with one of our people in the field? Depending on the source, this should be another opportunity for building rapport.
- NOTE – The best way to establish rapport is to understand the Buyer's Concept and to ask pertinent questions.

See Policy & Procedure memo #100 – Protocol for Handling Inquiries – if we suspect account is dealing with or has dealt with any other representatives of Profiles International. This memo is included at the end of this document.

2) DISCOVERY

Precepts (Rules, instructions, or principles that guide actions)

- Says Who?? - Until it Comes Out of the Prospect's Mouth, It Means Nothing
- More Than A Feeling - You Can Only Sell to Specifics, You Can't Sell to Generalities
- People Buy for Benefit to Gain or Avoidance of Pain. Of the Two, Avoidance of Pain is the Stronger Motivator
- Fumble Drill - Don't Jump on the First Issue Like It's a Fumble

The following concepts will be covered in this section:

- Buyer's concept
- Getting information
 - Confirmation Questions
 - New Information Questions
 - Current State
 - Vision/Desired State
 - Attitude or Solution Impact Questions
- Buying Influences – Roles or Types

Buyer's Concept

Understanding each Buyer's Concept, Mode and the other Buying Influences involved helps to form The Single Sales Objective. In phone sales, this evolves differently. In most sales, as we are normally initiating the communication, it is up to the sales rep to establish a valid business reason for the call, driving toward a Single Sales Objective. However, in responding to lead inquiries, the prospect can do much of this for us. **We need to find out what the prospect is trying to fix, accomplish, or avoid.** Our Single Sales Objective – to what we will close the prospect – will emerge from understanding the Concept, Mode and Buying Influences involved.

GETTING INFORMATION

Confirmation Questions

Although this may be our first call, we always want EVERY call to pose Confirmation Questions early on; to make sure we and the prospect have equal recollections; to confirm we're on the same page; to provide a starting point for additional conversation; to make sure nothing has changed; and to "frame" the

call. Also, if we carefully detail what we learned on previous calls with the prospect, it shows that we were obviously paying close attention to what they had to say. It also serves to “take the prospect’s temperature”, to see what they recall. If this is our first call with the prospect, we’ll want to confirm the information the prospect has given in his or her inquiry that can potentially move things forward. (There is some information that we have already gathered in Rapport.)

If this is NOT our first call, one of the first things we want to find out is, “*What has changed since the last time we spoke?*”

Other information the prospect may have already provided:

1. Company size
2. Number of locations or operations
3. Industry they are in and products they sell
4. Number of employees

New Information Questions

One of the hallmarks of great sales people is that they achieve **Situational Fluency**; they are able to **focus** in on the key elements of a situation and converse intelligently on those elements. All questioning will not necessarily follow these lines, and will almost certainly not include all the questions that follow. These are provided here as a resource.

Current State

Current state questions uncover the prospects:

- current state,
- problems of the current state and
- implications of the current state.

Do you currently use, or have you used assessments? Which ones?

- If use (or used), but not anything from Profiles, how is it that you came to use that tool?
- What does (did) it tell you?
- What would you like (have liked) it to tell you?

What particular issues or objectives have led you to look into adding (or replacing) a solution in your organization?

- Retention?
- Productivity disparity?
- Work ethic?
- Succession Planning?
- Training/Development?
- Leadership/Teamwork?

- Acquisition/Merger?
- Other?

Whatever the issue – we should do our best to DOLLARIZE IT. Ideally, the cost of the issues can be broken down into a per-day or per-occurrence basis. Note – **Don't stop at just one issue and dive into a solution.** Companies have multiple issues. We are not going to attempt to solve all of them at once, but this is our opportunity to at least find out what the issues are.

Are there other key strategies, initiatives or people /productivity/ leadership challenges in the organization? If the prospect appears to have multiple issues:

- *If you could solve just one issue now, what would it be?*
- *How critical would you say the other issues are? For example, on a scale of one (not critical) to ten (extremely critical), how would you rate each of these issues?*
- *What are some of the reasons you believe these issues exist?*
- *What have you done in the past to address them?*
- *For which jobs in your organization are these issues most pronounced?*
 - *Please tell me more about those jobs.*
 - *How do you measure performance in those jobs?*
- *Describe your typical (selection, hiring, employee development) process.*
 - *What are the biggest challenges you have identified in this process that make you uneasy?*
 - *For how long have they been experiencing these challenges?*
 - *What makes now such a good time to pursue this?*
- *How do you typically determine what training an employee needs?*

COMPETITION - *What other options are you considering to address this?*

- *What do you look for....?*
- *What have you found...?*
- *What has been your experience...?*
- *How do you determine....?*
- *Do you have...? How many...? What kind of....?*

Vision - Desired State

More than anything else, what we are **selling is the future.** Desired state questions explore what the ideal end result would be and how they would get there.

- *What are you hoping to accomplish through the application of a solution?*
- *"If you could resolve this issue, what would be different?"*

- *“Assuming you implement something to address this issue, what would constitute a success (from all stakeholders’ perspectives) a year from now?”*
- *What key metrics (dollars or other measurables) will we have influenced?*
 - *Cost*
 - *Productivity*
 - *Quality*
 - *Customer satisfaction*
 - *Employee satisfaction*
 - *Other?*
- *“When do you want to get started?” (Or, “What is your time frame?”)*
- *If the prospect has inquired about a specific instrument – When you came to our site and looked up Checkpoint, Profile XT, etc., what were you hoping it would do for you?*

Attitude or Solution Impact Questions

While New Information Questions focus chiefly on the customer’s desired results, Attitude Questions focus on how the prospect personally **feels** about those results. People remember 33% of what they hear, 50% of what they read, but 100% of what they *feel*. The purpose of an Attitude Question is to get the prospect to reveal personal information – information about how he or she, individually, will win or lose in this sale. Such questions seek to discover the individual customer’s values and attitudes, which are important in determining Concept. Attitude Questions are important specifically when you need to identify how a given individual will “win” or “lose” with your sale. They uncover individual needs, desires, concerns, feelings, and unidentified issues.

Questions:

- *How do you see your organization benefiting by the implementation of a solution?*
- *What will it mean to others in the organization to have this solution?*
- *What will it mean to you?*
- *How is it important to you/your organization to be able to _____?*
- *How would it help if _____?*
- *How will a solution affect you?*
- *I sense this means a lot to you.*

Buying Influence – Roles or Types

Precepts (Rules, instructions, or principles that guide actions)

- Don't Ask People to Make Decisions They Can't Make
- Love the One You're With! Find Out to What They Can Say, "Yes."
- Sell the Smell - Get Them Into Action!!! (Leverage that to get to the people who can say yes to more or to money)
- Don't Confuse a Referral for a Refusal.
- There are Many Ways that People Can Invest; Money is Just One of Them!

There are at least three Buying Influences involved in each sale, and possibly four. In smaller companies, one person may fill more than one role. In larger companies, there may be many people filling the same role. The buying influence types are:

Economic Buyer – The role of the person who will act as Economic Buyer for our sales objective is to give final approval to buy. There is always only one person or set of people playing this role for a given sales objective. The Economic Buyer can say yes when everybody else has said no, as well as veto a deal that everybody else has approved.

The Economic Buyer's focus is on price performance or return-on-investment. Will our system increase sales, productivity or conversion rates? Will we help reduce turnover? If our product or service matches the firm's priority needs and is a good value for the money, he or she can adjust the budget to find or release unallocated funds. He or she seeks to answer the question, "*Is there a better way to spend the money we'll be talking about here?*"

Among other variables, Business Conditions dictate at what level in an organization an Economic Buyer will exist. The less stable the overall business environment, the more likely it is that our Economic Buyer will be found higher up in the organization.

In addition - Lack of trust means greater perceived risk for the buying firm, and greater perceived risk means that the final decision to buy will move up the corporate ladder.

Also – If a policy decision has already been made in an organization to utilize a service or product similar to ours (perhaps from a competitor), then the Economic Buying Decision may be able to be made at a lower level in the organization. Conversely, if our product or service is very new to an organization, then the decision will probably have to be made at a higher level, where policy decisions can be made.

In finding an Economic Buyer in an organization, it is useful to ask the question, ***“At what level in my own organization would such a decision have to be made?”***

User Buyer – The role of User Buyers is to make judgments about the potential impact of our product or service on their job performance. User Buyers will use or supervise the use of our product or service, and their personal success is directly tied to the success of our solution. Another thing that motivates people at this level is the opportunity to look good to their boss or to help someone else achieve a perceived benefit.

There may be several people playing User Buyer roles in a sale.

User Buying Influences will ask about areas of day-to-day concern, such as the product’s reliability, service record, retraining needed, standardization, downtime record, and ease of operation, maintenance, safety, and potential impact on morale. Their focus is on how a sale will affect their jobs. Because this is a more personal decision, it may tend to be more subjective.

Because their personal success hinges on the success of our product or service, we have to take subjectivity into account when we’re selling to them. (And, as a result, Solution Impact questions – covered in our Discovery phase - may be more important in dealing with these Buyers.)

Their desired state may be a stronger driver with them. Productivity makes them look good. As a result, we get them on our side by answering the question, ***“How will your product or service work for me?”***

Technical Buyer – The role of Technical Buyers is to screen out possible suppliers. Their focus is on the product or service itself, and they make recommendations based on how well it meets a variety of measurable, quantifiable and objective specifications. Technical Buyers can’t give a final yes, but they can (and often do) give a final no. As with User Buyers, there are usually several people playing the role of Technical Buyer for a given sales objective.

User Buyers can be difficult, but Technical Buyers have to be. They don’t decide who wins, but they do decide who can play. In that regard, they can function somewhat as gatekeepers. They are really just involved to determine likely exposure for the organization. They ask the question, ***“Does this meet the specified criteria?”***

Coach – The unique and very special role of Coach is to guide us to our particular sales objective by leading us to the other Buyers, and by giving us information that we need to position ourselves effectively with each one. We usually (although not always) find the other three Buyers in the buying

organization. Coaches are different. They may be found in the buying organization, in our own organization, or outside of them both. Our Coach's focus is on helping us to make this sale.

For a sale to be made, we must identify, and hopefully directly communicate with each Buying Influence. We must understand their:

- Concepts
- Degrees of Influence
- Buying Process

Whereas most sales models require that we establish a Single Sales Objective prior to any communication with the prospect, *our* selling is different; our prospects are contacting us. Before we can establish our Single Sales Objective, we must understand the above information.

The most important point here is: Sometime prior to the call, during discovery or during closing, we are going to have to **determine to what your prospect can say yes**. This will determine our Single Sales Objective and to what we will close.

If we do not have all Buying Roles represented, it will impact to what we can close later. Closing to a Role that is not represented will not get us very far. Although all Buyers have an implied Economic responsibility, selling return-on-investment to an HR person may have limited impact. They may only be interested in ROI to the degree they can use that information to influence the Economic Buyer.

We'll cover closing later, but here are some general closing guidelines, based on the Buying Roles represented:

Typically, if we're talking with anyone in HR other than a VP – a **User Buying Influence alone** - we'll probably end up closing to a **contingency close**. We may quote a price to establish value, but we'll likely drop down to a contingency close. A User alone normally cannot make a buy decision, especially if it involves a change in policy. When we ask them for money, it puts them in an uncomfortable position. They may really want what we have, but because we have asked them for money, they may get stressed about how to go about asking someone in their company for that. And, despite their best intentions, they're not very good at it. Better to get them into action with a contingency close.

A possible exception here would be if the prospect is already using assessments and they have a budget. In this case, the Economic decision has been made and the User Buyer may be able to make the decision to switch the expenditure to us.

If both an **Economic and a User Buyer** are represented, closing to a dollar sale makes sense.

Although Purchasing Agents get to release money, they are really **Technical Buyers**. Someone else has made the decision to spend the money, or at least the decision to pursue funding. It is the Purchasing Agents job to determine who best meets technical specifications and provides the greatest bang-for-the-buck. (They frequently view it as part of their job to gain an additional discount.)

This is most likely to happen in the form of Requests for Proposal or Information. Frequently, a User decision has been made in the background. That User is driving the process. Once a vendor is chosen, that User will pursue funding through an Economic Buyer. Worse, the User may have already settled on a provider and the information we provide will be used to bolster that Provider's offering.

Unless a User Buyer has already brought us into this event, these requests are probably not worth much of a response. The recommended response to the Technical Buyer is to say, *"I am sorry, but we do not respond to requests such as these unless we have already established a relationship with the requestor."* With luck, the Technical Buyer will arrange for us to communicate with the User Buyer.

If we are talking with someone who does not fulfill any of the Buying Roles, such as a #3 or 4 HR person, it's probably best to go with a no charge close, maybe just a single free assessment. Those results can be leveraged up to put us in touch with the primary User Buyer.

We can zero in on the Buying roles – and thus correctly identify the people playing them – by asking these questions:

- To locate your single Economic Buyer, ask, *"Who has final authority to release the money for this sales objective?"*
- To find your User Buyers, ask *"Who will personally use or supervise the use of my product or service on the job?"*
- To find your Technical Buyers, ask, *"Who will make judgments about the specifications of my product or service as a way of screening out vendors?"*
- To find the people you can most effectively develop into Coaches, ask yourself, *"Who can guide me in this sale?"*

Here are some of the key additional questions we can ask in the Discovery stage to understand the type of Buyer with which we are working. Again, these are

questions lifted from the Discovery phase that aim at identifying Buying Roles or Types. These are not the sum total of our Discovery:

- One of the first clues is in knowing your prospect's job title. It's not a guaranteed indicator of the Buyer's role or type, but it certainly is an indicator.
- It's also good to ask, *"What has led you to take the lead on this initiative?"*
- More critical than that is knowing the prospect's ROLE, level of authority and responsibility. To find out, just ask them; *"What is your role in the organization?"*
- After some discussion of their issues, *"What impact have these issues had on the organization and on you?"* This is the win/result question. Results are what the organization realizes. Wins are what the individual gets. Knowing what constitutes a Win for your prospect will definitely help you define what type of buyer he/she is. If your prospect answers this question by talking about how much of his/her time this problem consumes, for example, then you may be talking with a User Buyer. If he/she answers that these problems are killing his/her budget, you may be talking with the Economic Buyer. If he/she responds, *"I just want to make sure we don't get sued,"* then you are probably talking with a Technical Buyer.
- *"For who in the organization are these issues most important?"* (Who else in organization has already bought into the need for a solution? Is this a company wide issue, or primarily in one department? How did it fall to this person to make this call? Answers to these questions will also provide insight as to other Buyers to be involved.)
- *"What happens if you don't make a decision on this? What is the cost of doing nothing?"* Someone truly involved in the issue should be able to answer this question. Others will not be able to. The answer will also indicate this Buyer's role or type.
- *"As you examine possible solutions, who else will be involved in process? How will information be shared with them? Would it be helpful for me to send copies of what we review directly to them?"*
- What is their procedure for changing company policies? (If they don't already use assessments, policy is going to have to change before they buy anything from you. HR people don't change policy, as a rule.)
- How do they go about securing budgetary dollars for new things?
- *"In the past, when there was something new you wanted in your area, what was your process to go about getting it?"*
- *"What is your approval process?"*

Having established who fills what Buying Roles, and to which of those buyers you have access, we are in a position to form a preliminary **Single Sales Objective**.

Single Sales Objective (aka Opportunity)

A Single Sales Objective is specific and measurable. It gives numerically precise answers to the questions who, what, when, how many and how much.

It is single rather than multiple. Each Single Sales Objective can be defined in a simple rather than a compound sentence. In a sentence where the connector “and” is lurking in the middle, we’ve probably got two, not one, Single Sales Objectives.

A Single Sales Objective should also include in what way achieving our objective will add value to the client.

Single Sales Objective format

- “To sell...
 - Name of company, dept., or contact
 - Solution, product or service
 - That will (value we will add or what we will help them fix, accomplish or avoid)
 - For (dollar amount)
 - By (date)

Single Sales Objective sample: *“I will sell ABC Company a Profile XT study, demonstrating how we can help reduce their turnover, for \$3500 by August 15.”*

To test a Single Sales Objective, ask these questions:

- Is it related to specific solution, product or service?
- Does it define the Who, What, When, and How Much of the sale?
- Will I be able to measure it when it’s accomplished?
- Does it say exactly when it is to be accomplished?

3) Credibility

As most of our prospects contact us, we have already established some credibility with them. Perhaps they have been receiving e-mails; perhaps they have visited our web site, or were referred by another user. For this reason (and because we've established additional credibility by asking pertinent questions up to now), the Credibility step in our process occurs later in the process than it normally would.

There are different types of credibility. Some may have already been established by this point in the process. Others may actually come later:

Personal - Asking pertinent questions always gives us credibility in the prospect's eyes. Letting the prospect know a little about your background, including other organizations you have helped, also helps.

Company – We need to at least work into the conversation where we are based, in business since 1991, 45,000 clients in over 125 countries around the world, assessments in 33 different languages. Some of our more recognizable clients include Compass Group (the world's 10th largest employer), Deluxe, Regus Group and Wells Fargo, to name a few.

Be prepared with case studies specific the prospect's industry.

Company Credibility can also include a Reference Story. If we know of a specific reference in the prospect's business, mention it – *“You may be interested to know that we have had success working with (xyz company or companies in your industry) helping them (increase retention, productivity, or other benefit).”*
Note – In addition to the references that may be available company-wide, it is a good idea to develop your own reference list.

Product – Is our product appropriate? Is it the best? Pilot results presented through the web site can help to establish Product Credibility.

Offer – Is what we're offering for the price worth it?

Service – Can we support what we sell?

Credibility must be established in all areas before a sale occurs.

4) Introduce a Profiles Solution – Leverage Unique Strengths

For the purposes of this demonstration, let's assume that the Profile XT is the most appropriate solution to the prospect's issues.

NOTE – DO NOT GO INTO THE DETAIL PROVIDED HERE WITH ALL PROSPECTS. WHAT FOLLOWS IS TO PROVIDE A FOUNDATION. USE THE INFORMATION SELECTIVELY.

Transition: To the prospect:

*“Profiles International, Inc. is in the job-matching business. We provide a patent-pending **technology** and process to our clients by which they can identify specifically what is required for success in any given job within their organizations. In terms of:*

- *Learning, reasoning, communication and problem solving ability*
- *Behaviors*
- *Interests*

Having identified that, we can show them – graphically and quantifiably - to what degree candidates for promotion or hire match that standard. We help our clients choose, and then properly manage, those people who have the highest likelihood for success in their jobs, while avoiding those who may be inappropriate for their positions. Through this information and technology, we also help our clients, most wisely, allocate their most valuable asset; their people. Overall, we help our clients reduce turnover while increasing productivity. If I may, I'd like to show you how we do that and, more specifically, how we can apply this technology in your company.

Please don't overlook one very important feature of what we do. We can graphically and quantifiably identify what it takes to succeed in any job, in terms of the elements that strongly influence success or failure, more than anything else a company may currently be measuring. That's a big selling point for a lot of companies, because they really don't know what it takes to succeed in their jobs.

This is especially important when selling to companies that currently use assessments or have had exposure to assessments. For these companies, just establishing the fact that we have an accurate assessment, may not be enough to sway the prospect to us, as we establish by having just one person take the assessment.

Assuming we have the client on a ReadyTalk conference, the Interview Guide may be the best place to start, if their focus is on selection. Otherwise, you may want to start with a Performance Model Comparison report. For now, let's assume the focus is on selection. **Key points to hit in the Interview Guide:**

- Why we measure what we measure - Five types of reasoning

- Broad-spectrum instrument
- Verbal skill - a measure of skill through vocabulary.
- Verbal reasoning - A basis for reasoning and problem solving. Numerical ability - Calculation involving numbers.
- Numerical reasoning - Problem solving based in numbers. (Some psychologists suggest that it forms the foundation for about 80% of deductive reasoning ability.)
- With this instrument we measure the types of reasoning that form the foundation for almost all problem solving, interaction, learning, and communication that take place on the job. We are able to tell you what type of problem solver someone is, and how clearly they can form the language of an idea.

Results are laid out here on a ten-point scale – a standard distribution curve. It's good to use the gallon bucket and gallon jug analogy here because it is very easy to conceptualize over the phone. People can understand that very rapidly. We may go into a little detail as to what it means to be high and what it means to be low. Give them some positive language on what being low means because that is one hurdle all of our prospects face. People in general think you've got to score high on abilities or you are somehow less desirable for employment. They lose sight of the fact that people who are low in the scale may be a little more focused, a little more task oriented, a little more production oriented or may tend to be great doers. We want to make sure the prospect understands what we are measuring here, and what the numbers mean.

To the prospect:

"We say that for every job there is a unique combination of Abilities, Interests, and Behavioral Characteristics that most readily lends itself to success on the job. On this page you'll see a shaded area for each scale. That is the combination for success in this job. We call it a Performance Model. The people that do best in this job tend to score in this area.

"We create these models in a number of ways:

- *We have a library of models built into our software for over 1,400 different jobs. (And an auxiliary library of many thousand more.) We can pull the patterns that are most appropriate for your jobs.*
- *"We have something called a Job Analysis Survey that allows whoever supervises a specific job to identify the work-related characteristics, abilities and interests s/he considers most critical for success in the job.*
- *"We can assess top performing and other people in each specific job. The fact is your people who out-produce others on the job do so because they come to the job equipped with the unique combination for success. With*

this instrument, we are able to assess those people and identify what they have in common, recognizing that it is these commonalities that enable them to excel. By extension, we know what it takes to succeed in the job.”

“Which particular approach, or combination of methods, would make the most sense for your organization? What makes you choose that? Let’s talk some more about this in a while.”

NOTE: If the prospect prefers the Preliminary Job Model approach, assure them that we have the appropriate models for their jobs. If they identify jobs not in the software database, we can talk to R&D to see what they might have to supplement the software library database.

“You’ll also see that we give you an indication as to how well this person stacks up against what it takes to succeed in your job in terms of thinking style, learning speed, problem solving ability. We call it a Job Match and it is expressed as a percentage fit number. This person is about a 70% match, not particularly good. We’ll talk about that in awhile. Overall they are about a 65% match, so we’ve got some surprises up ahead of us. Let me show you where those are.”

Behavioral Characteristics –

“How will some of these characteristics manifest themselves on the job? Although I am just going to give a shorthand version here. It is laid out more specifically later on, in the interview questions. Important point here is the Job Match % number we discussed a moment ago. It appears at the side of the page. We have now talked about a number of areas that we measure. Here you’ll see that this person is a xx% fit with the behavioral characteristics, and xx% overall.

“But you’ll see one other thing. It is important, when we give you data, that you know the data are good. It is also important that you know when the data are bad. Because, if we give you a pool of data, and we tell you 2% is corrupted, but we don’t tell you which 2%, we have effectively corrupted 100% of the data.

“So we have a distortion scale built into the Profile XT, to let you know how much faith you can have in the information. The person’s score is simply represented as either “Acceptable” or “Not Acceptable.”

Important – Distortion Score is an indication of the quality of the data, not the person. So, a “Not Acceptable” score does not mean this is necessarily a “bad” person. It simply means that we can’t have great faith in the accuracy of the data.

Occupational Interests section –

"This is based on the long-standing and nearly universally acknowledged theories of Dr. John Holland. Dr. Holland broke all occupations down into six main categories. Here we have captured them. These are meant to predict motivation and satisfaction in various job positions. This person is about a 39% match with occupational interests."

Good Conceptual phrase:

Essentially, what we're after with this instrument is:

- *"Can the person do the job?" (Thinking Style)*
- *"Will they do the job in a style or fashion consistent with success?" (Behavioral Characteristics)*
- *And, "Do they want to do the job?" (Occupational Interests)*

"Now you've noticed this person's numbers, you've seen the job model - what it takes to succeed in the job. The challenge for anyone looking to hire somebody is to determine whether or not they want to spend the time, money, and energy necessary to help the person adapt to a given task or job. Those places where a candidate does not fit a Performance Model are the areas where they will have to be managed. If you hire somebody that fits into the job model all the way, you'll be amazed how little management time and effort you'll put in this person to get them productive in a job, and actually get them to the point that they are a top performer.

"We want to give you an idea now, more specifically, as to what it will be like to manage this person in this job. What can you expect of them (and what will they require of you.) Any place they don't fit the job model, the Profile XT gives you behaviorally-based interview questions. Let's look at that section of the report so you can see what we are talking about. And here we are going to give you a better idea of what it means to be missing this model. For example, this person has a "10" on the learning index and the best person for this job tends to score in the 6, 7 and 8 range. What does that mean? That suggests that his assimilation of new information is greater than the position typically requires. He may experience boredom from the requirements of the job. Discussions with him should explore the possibility that the position may not be sufficiently challenging to maintain his interest level of performance.

"Have you ever experienced that with any of the people you have hired or managed? Have you seen them become bored, frustrated, and not fully challenged by the job?"

"We say people that score very high on Thinking Style are among the world's greatest problem solvers. We've also learned, if you put them in a job where there aren't enough problems to solve, they make problems. In fact, we find being geared too strongly for a job to be the most common source of difficulty our

clients experience with their employees. Most companies don't realize this is happening; yet they have to deal with it every day."

Interview questions –

We've covered the Thinking section, and Occupational Interests. Don't spend too much time on those interview questions, because the questions that will really evoke a response from your prospects will most likely be found among the Behavioral Characteristic questions. It's a little more fertile ground for developing the pain they may be experiencing.

Stress occurs when what you are does not fit naturally with what a job requires. From that perspective, there are no stressful jobs, only stressful JobFit.

Manageability is a good one. Again, people assume scoring high on manageability probably would be a good thing. But this is what it says here.

It suggests that, "His preference with operating within a routine procedural fashion is greater than the position typically requires. He may become frustrated by the need for flexibility inherent with this position." In other words, folks who succeed in this job are kind of freewheeling. They don't mind flying by the seat of their pants. They roll with the punches pretty well. Here are some questions: "How do you typically solve a conflict between you and the supervisor?" If he is high on Manageability, then he may be slow to acknowledge conflict or, certainly, slow to pursue it with his boss. "How do you solve a conflict? When is it appropriate to confront a supervisor about when he or she is wrong? What are your feelings about the role of authority in the work place?"

The total person – Tell the prospect:

This is the section that will give you a more specific idea as to what it means to be a "9" on the numerical ability scale, for example.

5) Summarize & Key Win-Results

We must summarize our understanding of the prospect's concept. This is especially important in competitive situations. In those situations, prospects sometimes get confused as to the comparative advantages of one option versus another. *The supplier that demonstrates the best understanding of the prospect's concept may therefore be at an advantage.* So, one phase of this step is a bit like Confirmation questions again. We need to confirm back the issues the prospect has given us, their desired outcomes, and then get into Key Win-Results.

To the prospect:

*"How do you **feel** about having a graphic representation of what it takes to succeed in **your** jobs? How do you feel about having a means to identify - quantifiably and graphically - exactly how a candidate stacks up against what it takes to succeed in a job?"*

We want to get an answer to those questions. In all likelihood, this is something they have never seen before.

"What will it mean to have this information the next time you are looking to hire or manage someone in your _____ position?"

Earlier, we asked some questions of the prospect as to how they might win through the implementation of a solution. At this point, we need to tie those potential Wins into what we have just presented. So **instead** of asking the following questions:

- How will this impact your organization?
- How will this impact you?

...We should be able to make a statement:

*"Earlier, we discussed your issue with retention. We agreed that the turnover you have been experiencing in your Customer Service Department has been costing your organization about \$780,000/year. **Is that correct?** Do you see how implementing our job-matching program could help you better select and manage the people you have working there, decreasing, perhaps dramatically, the turnover you have been experiencing? With fewer people to interview, that would give you the time you have been looking for to **focus more on your development project, wouldn't it?** And, a reduction of only 10% (\$78,000) would greatly enhance the image of your department."*

Remember: Result is what a company gets; A Win is what the individual gets. A Result must precede a Win.

Presumably, we get something of a positive response to the above questions/statements, to which we respond, "Absolutely!" Then we go into a close.

6) Proof, Action & Pricing

Precepts (Rule, instruction, or principle that guides actions)

- There are Many Ways for a Prospect to Invest. Investing Their Credibility is One of the Biggest... and the Most Personal.

Agreement to Explore

Action Commitment--Having identified our Buyer's Concept and Role, plus the other Buyer Roles, and having introduced a Profiles Solution, it is time to close to our Single Sales Objective, and gain an Action Commitment from our prospect.

An Action Commitment is a customer's promise to do something concrete for the buy/sell process. We should never end a sales call without getting from the customer a specific kind of promise we call an Action Commitment.

If we have made our way through the entire selling process, we should be closing to some sort of sale. Such a close would be an example of a **Best Action Commitment**. If we are ending this call without having covered enough ground to ask for a dollar amount, we may be closing to a lesser commitment. At the very least, we have to determine, at some point in the call, what we will consider to be a **Minimum Acceptable Action** in order for the prospect to commit. This could be as simple as asking the prospect to complete a Job Analysis Survey, or to get a complimentary assessment completed.

Basic Issues:

Assuming we are asking your prospect to make a decision consistent with their Buying Role (a very important assumption); a sale occurs when the Perceived Benefits exceed the Perceived Costs. We have done all we can to elevate the Perceived Benefits throughout much of this presentation. Now we can go through a series of drop-downs until those benefits exceed the costs. **However, we can only take a prospect through a limited number of drop-downs before we lose credibility.** That is why we spent so much time earlier establishing Buying Roles. We should not start too much higher than the level at which we perceive our prospect can say, "Yes!"

7) Summarize & Close to a Single Sales Objective

We essentially have **four classifications of closes**. What we have learned through our discourse with the prospect will dictate what we pursue and where we end up:

1. Those for which we'll get paid

- This may be a commitment to implement the program, and the prospect may be making an initial buy to do that.
- They may simply be buying x number of assessments.
- Or they may be committing to a Usage Agreement.
- Or it may be commitment for a study or pilot of 5-20 people for \$3500.

2. Those for which we MAY get paid

- No risk or **contingency close**.

3. Those for which we WON'T get paid –

- Assessments at no charge.

4. Job Analysis Survey

- Which may involve elements of each of the above.

A typical \$ Close:

"We've spoken about the fact that we can identify what it takes to succeed in any job and to what degree a candidate may match that standard. We provide interview questions to help streamline and improve the selection process, and we provide coaching, counseling, and training recommendations to help you develop people to their fullest, productive potential. Having said all of that, I would like to tell you something that we've learned from working with our thousands of clients. That is, until you see tangible evidence about people you know in jobs you know, it's difficult to really place a value on what this information could mean to your organization.

"The primary reason any company chooses to add an assessment to their screening process is to have a means by which they can more effectively, efficiently, clearly, legally, and economically differentiate between those who will be great in the job, versus those who won't. The best way we can demonstrate for you that our (PXT, PSI or CSP) will do that, is to show you how it differentiates between the great and not so great employees you already have. To that end, we would like to make a recommendation.

"We have spoken about your customer service department. You have twelve people in that department. With 12 people there, we would normally expect to find that 2-4 of those representatives clearly exemplify what you would like to hire in the future. Would that be fair to say? In addition, one or two people there

may be clearly performing at the other end of the spectrum. Does that sound right?"

Get their answer. Find out for sure how many they believe fall at either end of the spectrum.

"Mr. Jones, for \$3500 I'd like to suggest that we Profile those twelve people:

- We'll assess them, develop a Performance Model, and present the results to you and whoever else may have an interest or stake in this.*
- We will identify what it takes to succeed in that job and provide you with a Performance Model Analysis Report, detailing the functional requirements of the job.*
- Through our Coaching Reports, we'll also give you coaching, counseling, and training recommendations to help you get the most out of the people in whom you have invested.*
- And we'll give you Participant Feedback Reports so that all study participants may receive personalized feedback.*

"Most importantly, we are going to put you in the future position to hire those people who have the greatest likelihood of success on the job, while getting the absolute most out of the people in whom you invest. How does that sound to you?"

See what they say.

Contingency Close

The contingency close is just the same, except for the end:

"...people who have the greatest likelihood of success on the job. Perhaps the best part about this is that we can make this a no risk proposition for you. Let me tell you what I mean: After we've presented the results:

"Assuming you'll like this as much as we think you will, assuming you see the value we know is there, and assuming you choose to roll forward with our program, we'll deduct whatever assessments we have used in this demonstration phase from the initial inventory of assessments you purchase.

"However, as I said earlier, we find that, until we put tangible results in front of people, it's really hard to determine where this might fit in the scheme of things for you. After you've reviewed these results, it's possible you may say, 'Now I really understand it. Don't want it.' We won't charge you a thing. I should suggest, however, that you have a check ready. About 95% of the companies to whom we have made this offer are now clients. Does that sound fair?"

No Charge Close

Pretty much the same close as pay-for close, except, since we'll be no-charging, shoot for just 3-5 people, instead of 10 or more. Also, there is a variable to be worked out. With this prospect, especially since we may suspect this is not the person to make the buy, no-charge assessment is the price we will pay to get in front of the people who can buy. And the price your prospect will pay is committing to get us in front of those people. We need to make that agreement with the prospect.

At some point in the close (or perhaps earlier in the conversation) we'll ask the question (which we covered earlier):

"In addition to yourself, who else in the organization would be involved in making a decision to buy and move forward with our program?"

Get the answer.

"If I may, I'd like to make a suggestion. We really want the opportunity to demonstrate for you and (whoever else has been identified) how this program works and what it may be able to do for your organization. To that end, I'd like to provide you with five assessments to be used on those employees we discussed in your _____ dept. There will be no charge for this work; however, when I present the results, via an Internet conference, I'd like to have you and (whoever else has been identified) in the conference so that you all can decide to move forward with us after the results are presented. Do you think we can do that?"

Step Downs

Remember, until Perceived Benefits exceed Perceived Costs, we're not moving this person to action. If we've done all we can to raise the perceived benefits, and we're not going to add another decision maker to the mix without having an action step, then we're going to have to lower the Perceived Costs. Here are some step-downs. There are any number of variations on this.

From full implementation to...

- \$3500 Close
- \$1500 Close
- Contingency Close
- Five Free Close
- JAS and one or two at no charge
- One at no charge
- JAS Alone Close
- Others?

Alternative Close

More and more in our presentations, we may find ourselves getting to pricing earlier in the process. Although we quote our studies as a single price, we quote ongoing use of our assessments in 11-unit minimums.

Many companies find the notion of purchasing assessments for the screening of applicants reasonable, but they push back on having to pay for the assessment of incumbents. Despite how we may present the value of our assessments for use on incumbents, if their focus is on selection, they may resist.

The solution is to offer additional free assessments for model development with their initial purchase. (And only for the *initial* purchase.) If a department has 12 customer service reps, for example, we may be suggesting they assess 2-4 good ones and 1-2 marginal ones for pattern development. We might suggest they purchase 11 CSPs @ \$125 each, and offer them five additional assessments at no charge for model development. If the department had 50 people, we might suggest they purchase 25, and get 12 at no charge for model development.

This pricing approach assures our pricing integrity going forward, while letting the prospect get started on a deal.

It also opens the door for a step-down. If the prospect likes the idea of 11 + 5, but still says s/he must get approval, we are faced with sending a non-sales person to someone we don't know, to try and close the business for us with only sample reports and brochures. Not a good scenario.

What we may say if we get this objection or stall:

“Jane, I understand. Let me ask you this, if you need to go for approval, how would you feel about going with some tangible assessment results, on people you know in a job you know, instead of just the samples we have looked at, without any cost or obligation to you?”

Wait for answer.

“I have already suggested we provide five at no charge with your initial purchase of 11. How about us going ahead and setting things up for you to use those five at no charge now?”

Wait for answer.

“Great. I’ll send you instructions you can forward to the people you choose. The system will let me know when they finish. I’ll prepare a preliminary model and get reports ready for you. If you like, maybe we can then arrange for me to

review those results with both you and your boss in a phone conference. How does that sound?"

Ideally, we'll end up in a phone conference with the boss. At worst, our contact will end up going to a meeting, after we have reviewed results, in a much better position by which to make the case for the assessment. They will be much better informed and much more enthusiastic, with a much higher level of conviction.

JAS Closes

It is important to remember that a strong competitive differentiating factor for our company is the fact that we create customized models for our clients. It is through these models that we are able to job-match, and job-matching sets us apart from the vast majority of our competitors.

We have people in our company who sell by having their prospect take one of our assessments. They sell based on the accuracy of our assessments, and then lead into the job-matching component.

Despite the fact that these people do very well selling this way, I prefer to lead with the job-matching component, and our Job Analysis Survey is the easiest way to get a prospect to make THE JOB-MATCHING TRIP.

So, here's a close using the Job Analysis Survey:

"I would really like for you to have the opportunity to see, in part, how we go about identifying what it takes to succeed in your jobs. Let's at least do this: Something I emailed to you (or if you are in ReadyTalk, bring it up on screen) is a component in the model development process. If you will, double-click on the file I sent you that says JAS, while we discuss this, maybe you can print out a copy."

Click on the JAS and start walking them through it - not all the way through it, just enough for them to get the idea and enough, hopefully, for them to carry on with it. And then we might say –

"Here is what I would like to suggest, I'm going to have you e-mail or fax this back to me when you are finished. I would also like for you to have someone (or two) in this job take the Profile XT. Ideally, this will be one of your top performers. I'll e-mail the instructions later, to forward to whomever you choose. We'll have them take the assessment over the Internet, if that is all right."

The Profiles Assessment Center software allows you to create a model based on just one person and a JAS. The resultant model will be based 2/3 on the individual and 1/3 on the JAS. It is very unlikely the individual will come out looking badly in comparison to a pattern based 66% on them.

One other step down is to simply do a JAS without anyone taking the Profile XT –

“I would really like for you to have the opportunity to see, in part, how we go about identifying what it takes to succeed in your jobs. So let’s, at least, do this. It will take only a few minutes and won’t cost anything.”

Start filling out the JAS over the phone with the Prospect. Ask them when they can get it done and transmitted back to you.

“Then I can show you something that will really excite you. When can you get this done for me? When can I expect you to transmit this back to me?”

Get some kind of commitment out of them. Typically when people make a commitment they are scribbling it down and sometimes they are more likely to meet it.

The moment an individual answers any question on the Job Analysis Survey, they have bought into the concept of job-matching. This is an important accomplishment. If they didn’t buy into job-matching, they would respond to the first few questions by saying something like, *“This question isn’t relevant.”* But they’re always relevant. For this reason alone, the JAS is a valuable marketing and selling tool.

The deliverable after the prospect returns the JAS to you is a Job Analysis Report. The close, when you review that report with the prospects, is the Golden Birdcage close:

“I wonder how the people you have in this job now would score in comparison to this?”

With any answer, we are back to attempting any of the earlier covered closes.

Ideas to incorporate – **Law of Limited Opportunities**

- More you must compromise
- More you must make of each opportunity.

Interview questions also help see to what degree person has already learned to adapt for specific traits, etc.

MEMO

To: Enterprise Solutions Sales Team
From: Bud Haney
Date: Updated 10/6/10
Re: Inquiry Protocols
Message: **Memo 100**

With 750 Strategic Business Partners in the field, and around 180 of us here at Corporate, there is a good chance that companies contacting Waco may have already communicated with one of our people in the field, or someone else in Corporate. We need to be sure we are not interfering with an on-going relationship. For that reason, we need to follow these steps with all inquiries:

- 1) If this is an electronic inquiry, CRM will have already been screened for duplications. If this is a phone call, look up the company and/or individual in CRM. (Remember, general query in CRM won't search both first and last names among Leads. Can only search both together in Lead query.) With either electronic or phone inquiries, we should also look up the company in the Client Lookup Utility in the Company Intranet. If we find it in CRM listed for someone else at Corporate, refer the call over to that rep. If that person is unavailable, see if the caller can wait for person to return phone call. If their need is more pressing, we should see what we can do for them. If the call ends up creating a sale, some sort of split may have to occur, depending on the involvement level of each Rep. Whether or not a sale is made, email the Account Mgr. so that he/she knows what has occurred.

If we find them in the Client Lookup Utility in the Intranet, and it appears to be a current client, check with the Department Head.

- 2) If they are in neither CRM nor the Client Lookup Utility - "Do you currently use, or have you used assessments? Which ones?" (If already using Profiles' assessments, we must immediately and automatically defer to the field rep, via their Sales VP. Get the Sales VP on the phone and let him/her handle the caller.

- 3) If they are not a current user of Profiles' Assessments, "How did you learn of us?"
- 4) If their answer presents the possibility that they may have had some interaction with one of our field reps, or someone here at Corporate - "I ask because we have a number of representatives in the field. Frequently we hear from companies after they have had some communication with one of those reps. I gather from your answer you have (or have not) had some communication with one of those reps, or with someone here at our corporate office?"
- 5) If they have had contact, what was the nature? Are they scheduled to talk/communicate again?
 - a. If their answers make it apparent that an on-going relationship exists, "What has prompted you to contact us instead of your rep?"
 - b. If there appear to be no issues with either the rep or the service, then defer to the field rep, as in #2 above.
 - c. We will need to involve the field rep through the Sales VP if the contact is stating a preference for a corporate-to-corporate relationship, or if there appear to be some issues with either the rep or the service. (Simply fishing for a better price would not be an acceptable reason for us to intervene, because we will not cut prices.) Contact your Department Head for guidance.
- 6) If no previous or on-going relationship appears to exist, or no contact within the last three months, sell the account.