

Selling Your Professional Services *as a “Non-Professional Salesperson”*

Second Edition

Helping Professionals Help Their Clients™
A TRI Publication

Matthew Cohen

Peter Stephan

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Matthew Cohen was born and raised in the San Fernando Valley outside of Los Angeles, California. Matthew attended the University of California at San Diego where he graduated with a degree in Economics. Mr. Cohen joined Mr. Peter Stephan TRI after successfully managing multiple companies for over 15 years. In addition to practicing for the firm, his sales and marketing experience propelled company growth over 300 percent in the short span of 5 years.



In his younger years, Matthew worked with his father Michael Cohen running a successful services business. Matthew attributes his achievements in sales to his father who successfully practiced sales for the better part of his work life.

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Peter Stephan was born and raised in New Jersey. Peter Stephan graduated from Fordham University with a Degree in Business. His detailed research into IRS tax code led him to specialize in IRS practices and procedures. With over 25 years of experience practicing in the area of tax and tax controversy, Peter has become a foremost expert in his field. At the age of 19, Peter bought and sold his first business, which allowed him to fully fund his college education.



A combination of Peter's business education along with the experience he gained owning businesses allowed Peter to define and refine his sales and marketing skills for mass consumption. Peter has built one of the most successful tax resolution firms in the United States.

About TRI

TRI is a full-service tax and accounting firm that specializes in resolving our client's tax concerns, specifically issues with the Federal (IRS) or State taxing agencies. In addition to practicing tax, TRI teaches other professionals how to market and sell their professional services.

With 30-plus years of experience, TRI has developed in-depth, in-field, expert marketing and sales strategies to enlist new clients nationwide. TRI provides quality instruction and instruction materials to professionals throughout the United States.

If you have any questions, comments or require assistance with any issue, please contact TRI by calling us at **(877) 829-8370** or emailing us at:

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Be sure to include your telephone number as well as your email address so that we may respond to our questions in a timely manner.

See our full menu of products at:

www.taxresolutioninstitute.org

Forward

If you have this book in hand, we can assume one of two things. Either you are a professional looking to increase business, or you are considering learning how a professional gets business from scratch. In both situations, this guide will come in handy.



Whether you realize it or not, you are a salesperson. You have spent endless nights trying to sway your spouse to eat where you want or see the movie you want to see. Maybe you spend time trying to get your child to take out the trash, or have you found yourself in a situation where you need to convince a checkout clerk at the supermarket that the coupon you are using does in fact apply to the paper towels you placed on the belt.

In each of these scenarios you are selling (albeit, maybe not well). Based upon statistics, only a few of you work for large companies that have sales departments assigned with the task of bringing in new business. For the others, business development relies on the professionals in the firm to garner new clients.

Often it is one person or a few people (“Rainmakers”) that generate new business for the company. If you run a small company or operate as a sole practitioner, being a Rainmaker may be a scary proposition. If you are an employee of a company that needs new clients, you can add a great deal of value by bringing in new business.

If you are reading this book, you are most likely not a salesperson by profession. If you want to practice this seemingly “mystical” task, it is important that you understand the basics of selling. Once you gain an understanding of the basics, it will be easier to navigate the sales process.

As a professional trying to balance business development with providing quality services, the time you have available to sharpen sales skills will be limited. The purpose of this book is to provide several succinct tips that give you an edge over other professionals that do not understand the sales process.

To offer the most value to professionals with limited time, this guide is formatted to provide stand-alone tips which are broken down by category. You will see that each tip indicates either what “to do” or just as important, what “not to do” throughout the sales process. You may find that some tips come up more than once. This is not by accident. We understand that selling as service professionals may be secondary to your primary career functions and therefore want to ensure that useful information is easily accessible throughout the entire book.

The words “prospective client”, “prospect”, “caller”, “potential client”, “consumer” and “person” are used interchangeably throughout this book. Note that even though “caller” may be used in certain circumstances, it does not mean that the technique would not apply to a live meeting as well as a telephone call. In other cases, we will give specific examples that

apply to either a phone call or live meeting. In these situations, we will make the distinction.

The information included in this book comes from a variety of sources including other sales books, sales seminars, sales articles, sales programs and 30-plus years of selling professional services by the authors.

Most sales courses are geared toward people that choose to sell as their primary profession. This book, however, is geared toward the person that provides professional services and needs to sell in order to increase business.

Our goal in creating this book is to provide you with a comprehensive guide that is both easy to follow and full of useful information that can be accessed without having to memorize the entire book.

This guide is divided into five chapters categorized by either sales principles or by where the items exist in the sales process. A quick reference guide is included as well. A glossary of sales terms is at the end of the book. The topics covered in this book are alphabetized in each chapter. This may not match the sequential order of when an item occurs in the sales process. We felt this would be the easiest to find what you are looking for.

Do not be afraid to access the table of contents at the beginning of the book on a regular basis. The table not only includes chapter titles but also includes sub-headings to ensure you can find everything you are looking for in an easy-to-use and concise manner.

We suggest you first read this book in its entirety. After that, keep it handy to use as a reference guide. Be sure to highlight the tips that resonate most with you. Remember there is a large amount of useful information offered in this book and you should not expect to implement all of the items covered here in your sales process.

With the guidance offered in this book along with a little a little practice you will learn to...

- **Increase your business activity without making your prospective clients uncomfortable**
- **Sell in a manner in which you are comfortable from start to finish**

Chapter 1

Sales Principles

To become an accomplished salesperson, you must understand how the consumer thinks. As a consumer having purchased goods all of your life, you would think selling would come naturally to everyone. As ninety-nine percent of us have come to understand, nothing could be further from the truth.

Consumers tend to make purchases with their guard up. We believe this relates to the negative perception that salespeople have come to garner. In industries such as automobiles and furniture, salespeople have reputations of lying to their customers. Because of this, people interested in buying these types of products go into a buying situation with a negative attitude.

In order to make the buying experience a pleasant one for both the purchaser and the salesperson, you must understand how people think and what motivates them to make a purchase.

In this chapter you will learn some basic principles as they relate to a sale and to the sales process. In the following chapters of this book we will go into detail as to how the process works.

Begin Each Sale with an Understanding of How Long it Will Take¹

When you begin a sales process, make sure to briefly cover the points you want to cover at the beginning of the conversation. One of the items that should be covered involves providing a clear understanding as to the amount of time that will be necessary to complete the entire sales call. By being prepared, you are sending a clear message to your prospect that your time is just as valuable as theirs. You are also informing them that you intend to have a meaningful and pointed discussion within the time allotted.

This demonstrates that you respect the prospective client's time. If they indicate that their time is short, reschedule the call or even better, a subsequent meeting for a later time. The initial interaction is a good time to gauge if your client is seriously seeking your services or just shopping around.



Steer the Caller Through the Sales Cycleⁱⁱ

In order to be an effective salesperson, you should be listening to your prospective client 70 percent of the time. When you have the opportunity to speak, you want to use your words wisely. In the optimal situation, you will turn the conversation so the prospective client is selling themselves.

To accomplish this turn, you need to guide them along your predetermined path. Be sure to ask transition questions. This keeps the conversation moving in the direction you want. According to sales guru David Sandlerⁱⁱⁱ, you should begin the sales process by bonding with the prospect in order to build rapport (see Quick Reference Guide).

This can be accomplished using various techniques including matching and mirroring a caller's vocal tone, adjusting the pace at which you speak to emulate the caller, sharing the caller's level of energy and using words that replicate the caller's vocabulary (see Quick Reference Guide).

You may also consider displaying empathy when it is appropriate. By doing so, you keep the caller on your sales track. If you have something in common with the caller, be sure to express it to them. You want to also be sure that they do not perceive you as "being in a better place" than they are. No matter how dire they indicate their situation is, you should try and empathize and not compare yourself to them.

Build a Network^{iv}

Even though this topic does not naturally fall directly within the "sales" category, it is still worth mentioning. We ourselves have been successful in building our network and increasing our client base. We accomplished this by participating various types of business networking groups. We recommend joining a larger group of professionals, even if the group includes other professionals that practice the same work you do. Most professionals specialize in more than one area. This being the case, many professionals are nervous to interact with their competition.



If on the other hand, you interact directly with your competition, you learn what they are doing. It makes more sense to interact with hundreds of professionals who can refer you business openly, than to interact with 30 or so professionals who are restricted to referring business to you along with a select number of other home group members.

If you become a trusted resource to hundreds of professionals, you may be able to mitigate the need to market your services.

Don't become an Unpaid "Consultant"

Following this 'mantra' is one of the most valuable things you can practice in the sales process. In addition to discussing this topic here in this chapter, this principle is discussed throughout the book. YOU SHOULD NOT spend the limited time you have educating your

clients. Not only is this an ineffective way to sell, but it actually moves you backwards in the sales process.

Your job as a salesperson is to find what motivates your prospective client to buy then capitalize on it.

Your job as a service professional is to use your education and experience to help your client meet their goals. Notice that nowhere in either process is it your job to tell your prospective client and subsequently your client how you do your job.

Professionals are hired based upon their expertise. Their education and experience allow them to offer expert service without their client having to worry about the process in which the work is done.

When you educate a prospective client, you may actually be adding unnecessary stress or alternatively, making them feel better so they prolong hiring you.

Don't Present ALL of the Information Up-Front^v

It is important to understand that your purpose of having a sales call is not to educate your prospective client. It is never a good idea to present all of the information you have at your disposal in your initial call or meeting. As a matter of fact, there is no reason to explain your process at all.

Remember you are speaking with someone that has yet to hire you. If you offer too much up front, you may be shooting yourself in the foot by allowing the caller to ease their “pain” before they pay you.



In order for a successful professional to run their practice, they must understand the product or service they offer in intimate detail.

In order for a salesperson to reach success, they should have at least a limited grasp of what they are selling. More importantly, they must know what to share and what not to share with their audience. In your case you may be filling both the professional and salesperson role, you need to be careful to "play" the role of the salesperson and not the expert when you are selling.

It may seem counter-intuitive but seeming to know too much can work against you in the sales process.

Don't Sell Your "Product/Service"

In the past, sales pitches were conducted by discussing the features and benefits of what product or service the salesperson was selling. Once the "pitch" was complete, the salesperson would field objections, which often delayed closing the sale by the purchaser.

After fielding objections, the salesperson would do their best to overcome the prospect's concerns.

By selling the old fashioned way, a salesperson provides no level of comfort to their intended audience. Remember, the prospective client contacted you to fulfill a need that they believe you may be able to fulfill. Most likely however, they do not know you from Adam.

Providing a stranger with a dog and pony show about what you have to offer will not gain their trust. In fact, it will most likely make them feel uncomfortable. Attempting to overcome their objections may backfire. You may come across as pushy or self-serving not to mention that when they do make an objection, they will be putting you on the spot. In lieu of selling what *you do*, sell your expertise (see **Sell Your Brand**).

Don't Teach the Prospect Your Step-by-Step Process

The most common mistake professionals-acting-as-salespeople make is to share with the prospective client exactly how to solve their problem. We are not referring to solving a problem in the general sense here. Rather we are referring to actually provided solutions. A professional will actually provide step-by-step, blow-by-blow instructions explaining everything they plan on doing to make the caller's pain go away.

This procedure may work if you are in the business of training others how to do the work your job. Even if your job is training, you still do not want to act this way if you are selling your job training services. The reason most professionals acting as salespeople fall into this trap is that they feel most comfortable demonstrating their knowledge of what they do. They think it will help them close the sale. They must understand that this type of selling does not work.

As mentioned before, this is what is referred to as selling features and benefits. This process involves "educating" a prospective client on what positive differences the product or service being sold has over one's competitors.

This type of selling not only takes way more time, but it tends to work on very few people. Instead, an informed salesperson will focus on learning as much as they can about their caller's needs ("pain") by asking the right questions. This way they understand what they should provide in order to ease their soon-to-be client's pain.

It is amazing how many salespeople end an initial sales call feeling great about their presentation. They did a phenomenal job demonstrating to the prospective client the benefits of what they have to offer; only to ultimately find out that they ended up losing the sale.

If you ask them why the client did not bite, they have no idea. You will never be able to determine how your product or service will fit your client's needs if you do not first figure out what those needs are. REMEMBER TO LISTEN 70 PERCENT OF THE TIME YOU ARE SELLING.



Goals... We All Have Them^{vi}

Most salespeople believe that setting a sales goal is par for the course. If you are a salesperson by trade, you most likely have a sales manager. He or she will assign their team a set of goals based upon company expectations. We assume that companies set goals in order to attain better results.

They believe reaching these goals provides more value if they set stringent sales guidelines in advance. If you have tried selling before, you may have experienced what we are about to discuss. If not, you should be prepared nonetheless.

Let's assume that you just set a goal a sales goal at the beginning of a given month. You are working away and come to the halfway point in the sales cycle. That is the period of time you allowed yourself to reach your goal. Upon further reflection, you discover that you are not on track to reach your goal. You begin to

panic and push twice as hard to make up for your perceived under-performance.

You come to the last part of the sales cycle only to realize that you missed your benchmark. Let's assume that you missed it by less than 5 percent. How disappointed does this make you feel? The answer is probably very disappointed. It is silly to get upset for not reaching an arbitrary finish line.

If your livelihood depends on sowing what you reap. For example, a person that earns a living by getting a commission on sales, they will especially feel upset if they barely missed their goal. They will feel defeated entering into the next sales cycle. Rather, it would make more sense to reward them each time a sale is closed.

Two lessons can be learned from the above-mentioned examples. First, if you are going to set expectations, they should be realistic and should relate directly to each sale. For example, if it has historically taken 10 calls to land a meeting; and 3 meetings to land one sale, how many calls do you need to field to reach your goal of 10 sales? In this case it would take approximately 300 calls. Depending on the span of time that makes up your sales cycle, 300 calls may not come in. Therefore, this goal is not practical and you would be setting yourself up to fail.

You need to set goals that are activity based rather than result based. Results can easily change due to reasons that are totally outside of your control. Setting goals that are either unreachable or that can be reached too easily can be counter-productive. If you set goals that are realistic and based on productivity, you can properly manage yourself and if you desire, a sales team.

Humble Equals "Honest"

The novice salesperson assumes that their prospective client wants them to be perfect. They believe that they need to come across as a know-it-all. Nothing could be further from the truth. You need to remember that someone seeking your help is looking for someone that they can trust.



If you indicate you are able to do everything perfectly and display complete confidence, you will most likely intimidate your audience. That is, you will scare them off and lose the sale.

You are much better off mirroring your prospect^{vii}. If they come across as humble, you should be too. If they ask you a question relating to what you do, hesitate before you provide an answer. Slowing down can go a long way to someone that is slow paced.

When asked a specific work related question, do not be afraid to say something like "I'm not sure. I have done similar work, but your situation is a little different" or "let me get back to you on that, I would have to do some research before I answer that question." Responding with these types of answers helps you in two ways...

- These types of responses keep you from having to offer no-cost consultations which take time and lower your chance of closing a deal, and
- They show the caller that you are human. Humans like buying from humans...not robots

Feel Satisfied Disqualifying a Prospect^{viii}

Much of a salesperson's time is spent interacting with a prospect. They spend the majority of time discussing topics that either have no effect in closing the sale, or even worse lower the chances. If you are not careful, you will waste hours of time selling to prospects that never had an intention of buying from you and probably no one else for that matter.

Learning how to prequalify or disqualify a prospect quickly will make selling easier and much more fruitful. By utilizing the skills that follow, you will save precious time that could be spent billing for your time rather than speaking with someone that is not yet a client. These skills also free up time to sell to qualified individuals who are actually seeking your services rather than free advice.

An inexperienced salesperson typically has no idea how to prequalify a prospect. With a little practice you will be able to disqualify someone that is not a serious buyer. Short of making a sale, nothing feels better than getting an unqualified lead off the phone within a few minutes. You should always be mindful for signs that your lead is either not qualified or not serious. Examples of unqualified prospects include...

- Someone that is not the decision-maker, and

- Someone that does not have the time necessary to finish the sales process.

Ask the caller to provide a **yes** or **no** at the end of your conversation. Let them know that **maybe** is not an acceptable response. Make sure that the caller can afford to pay for your services. Following these steps will save you hours of lost time and unnecessary frustration.

Learn how to Overcome the Most Common Objections^{ix}

If you are going to sell, you should expect to receive rejections. More importantly, you need to be okay with them. As you become more experienced, you will learn how to masterfully cope with the rejection and make every no you receive a learning experience.

After each failed attempt you need to ask yourself two questions...

- Did my sales process lead to the rejection?
- Did I not properly prequalify the prospect?

The **yes** answer should be the response to one or both questions listed above. As you become better at answering these questions, your ability to determine whether or not someone is a realistic prospect will improve as well. Once you practice sales at this level, you will not mind losing a sale. Remember, a **no** is always preferred to a **maybe** or a **let me think about it**, both of which are unacceptable responses at the end of a sales call.

You should not be left guessing where you stand with a prospective client at the end of a sales call or sales meeting. This just leads to more wasted time and shows you that you did not complete the qualification or beginning sales process correctly.

Listen Before Talking^x

A good salesperson is typically charismatic. Because they have this trait, they often mistakenly try to dominate the sales process by talking more than they listen. They are so resolved to share their "knowledge" that they fail to determine what the prospective client is actually looking for.

Some salespeople tend to talk as a defense. This is easy to do when someone feels there is a lull in the conversation. It is a natural to react in this manner but not wise. To overcome this knee-jerk reaction, utilize the transition questions (see **Quick Reference Guide**). Doing so will keep the prospect and the sales process moving in the direction you want.

Make Sure the Client Knows the Objective of the Call^{xi}

Make sure you state YOUR objectives soon after the call begins. Do not allow the caller state theirs. You need to control the process the entire time you are on the call. By laying out your expectations of the process, you take the pressure off of you and the prospect.

For instance, if during the sales meeting you correctly implement the sales process by...

- Learning as much as you can about your prospect and
- Understanding that you will not be selling your product or service, you should be able to set up the conversation and guide it down the line in a smooth fashion.

You will find that in a successful sales meeting, the client will be speaking 70 percent of the time and offering valuable information

in a concise manner. This way you minimize the time necessary to complete the process and ultimately allow you to close the sale.

You should also indicate up front that you expect to come away with a decision by the end of the call or meeting. It may seem awkward at first to let the caller know this, but as time goes on, it will become easier. You will find it beneficial to you and the prospect to be direct. You need to let them know (politely) when they are straying from the path you have set.

If you are given the opportunity, reference prior meetings and conversations. This shows that you remember the caller. This provides a high level of trust. Going forward, the caller believes that you will make it a point to pay attention to their needs. This elevated level of trust you create goes a long way in ensuring you close the sale.

Measure Success Based On Client Action Regardless of the Outcome^{xii}

Assuming you did not close the sale, how can you tell whether a sales call was successful or not? To make a determination, you need to know in which direction the prospective went after your call. More often than not, finding out what happened is impossible.



An effective salesperson ends their sales calls knowing whether they did their job well. This is true even if they did not close the sale. If your prospect never had the intention of buying your service, you would be foolish to base the success on closing a sale.

Rather, in this case you should measure how quickly you were able to disengage yourself from the conversation. To be good at selling you need to self-reflect on a consistent basis.

This allows you to determine if you followed the process correctly. If you did, you will feel satisfied knowing that you personally had nothing to do with losing the sale. Knowing that achieving success need not be based upon money coming in the door makes this job much easier. The confidence you gain will carry you far in the selling process.

Low Price, Quality and Service—Pick Two

Let's try looking at things from the viewpoint of the consumer. When a consumer seeks a product or service they want the following...

- They want to purchase a product or service at a low cost
- They want the product or service they are purchasing to be built or provided at an acceptable standard of workmanship
- They want the product or service they are purchasing to be delivered by someone professional and done so in a timely manner

If you run a business, you understand that the second and third items listed above cost money. In order to sustain a viable business, you would need to increase the price in order to meet the client's expectations. As you can see, it is impossible to provide all three assuming you want to run a profitable business.

If your intention is to sell, you will always be better served charging your prospective client more assuming that doing so will provide a higher level of service in a professional and timely manner. In time, your clients will forget what they paid for your services. They will never forget if you provided poor quality.

Using the selling techniques offered in this book will allow you to overcome the concern of having a prospect balk at a higher price. Price becomes insignificant when the buyer feels the amount they are paying provides equitable value.

Put the Prospects Needs First

Have you heard the term **kill or be killed**? It is important to know that this phrase has nothing to do with becoming a successful salesperson.

If you want to be effective, do not focus on what you have to gain from selling. Rather, ensure that you are mindful to provide value to your prospect every step of the way.



We mention several times throughout this book that you should not waste time with callers that provide no value to you. You should think this way in reverse when considering the needs of a qualified lead.

If you pay attention to what your prospective client's needs are, and you are able to show that you can provide a solution to ease their "pain", you will not only create a business alliance, but will also create a trustworthy ally committed to you.

Sell Your Brand

When you first engage a prospective client, determine what motivated them to call you. Maybe you are a certified public accountant, lawyer, enrolled agent, wealth advisor, insurance agent, realtor or one of the many other professionals that provide services to clients.

Maybe you are the best at what you do on a professional level. Maybe not. It really does not matter. If indeed you are top in your profession, that is not what gets clients to sign on the dotted line. It is important to remember that there are tens of thousands of professionals that do what you do. Even if you are better, many are good enough.

You may ask yourself, “Why did the caller contact me?” This is not where you want to focus. Rather, you should consider what motivated them to pick up the phone at all. If you are able to get that answer, your chance of closing the sale increases exponentially.

The key here is finding out what motivated the caller, not what makes you different from your competition.

Set the Expectation of the Meeting/Call Up-Front^{xiii}

Assume you are going to be receiving a call from someone with whom you have had contact with at least one time before. Prior to the upcoming call, you should set guidelines as to what will be discussed.



You should set up a specific date and time on which to speak. At the beginning of the meeting, request permission to ask questions of a personal nature.

Ask the caller to agree to say **no** if they feel you are not the right fit. Then ask them to agree to say **yes** and allow you to move forward with your representation if they think you are a good fit. Let them know that it is not acceptable at the end of the call for them to say **let me think about** it or some other version of that.

Be clear from the start and make sure these points are understood and followed. In addition, before you begin the process you need to ask if anyone else needs to be on the call in order to proceed (the **decisionmaker**) with hiring you. You can accomplish this by asking something simple like, **Who besides yourself, who will be involved in the decision making process?** This way you are not undervaluing the person with whom you are speaking.

Slow Down^{xiv}

Once a salesperson acquires the sufficient amount of knowledge and experience necessary to understand how their company performs its duties, it is difficult to fight the urge to tell the caller everything he or she knows about the process. This is especially true for someone that provides professional services .

If a potential client calls with a case that is right up your alley, you must remember to slow down and follow just the sales process. You will gain much more building rapport and trust with your prospective client by selling properly, than you would otherwise gain by proving how you are able to solve their case. By avoiding the mistake of selling features and benefits, you can effectively differentiate yourself from the herd and ultimately gain more business.

If you approach each sales call as an opportunity to be seen as a trusted advisor rather than an expert, you will receive benefits for years to come.

Under Promise and Over Deliver^{xv}

Under promise and over deliver is an expression most have come across at least once in their professional lives. While you may understand what this means in the general sense, you probably do not know what it means in the sales sense.

In sales, under promise and over deliver refers to setting the expectations of your prospective client at a level that you know you

can meet with little to no resistance. By doing so, it eliminates the necessity to have more conversations down the road. You do not want to be stuck explaining why something took longer, cost more or did not come out as well as expected.

One place this idea relates directly to the sales process is quoting prices. Be careful not to lowball your price. Lowballing prices is a form of over promising that will inevitably lead to under delivering. This will eventually lead to a very unhappy client. Remember, price is not something people focus on in the long run.

Value vs Price—What is the Perceived Benefit?^{xvi}

Have you ever been in a situation where someone tells you that you are not charging enough for your services? We are guessing the answer is no. Wouldn't it be nice if a prospective client let you know ahead of time so that you could have charged higher rates? Although this never happens, it does touch upon an important point.



The amount that you charge for your product or service is not too high if the prospect is willing to pay. Your job as a salesperson is to gauge a prospect's need for your services.

If you are able to express the value a caller stands to gain by hiring you, price no longer becomes an issue. People will happily pay for what they perceive is offered in value. It is only when your prospective client fails to believe that the benefit they are to receive by enlisting your services is valuable that price becomes an issue.

This explains why some professionals bill at ninety dollars per hour while others performing the exact same work are able to bill at one thousand dollars per hour. What is the difference? Perceived benefit.

Chapter 2:

Advance Preparation

Growing up, Peter Stephan joined the Boy Scouts. This by itself is not a significant accomplishment. Unlike most scouts, Peter was able to achieve the rank of Eagle Scout. This is not an easy task. Peter understood the importance of making the necessary commitment, putting in the long hours and staying focused. Peter clearly understands the importance of being prepared. After all, “Be Prepared” is the motto of the Boy Scouts.

Being prepared in the sales sense means understanding how the process works. It requires that you adhere to a set of rules that will allow you to control the process. If you succeed, you will sell without placing undue pressure on your prospective client.

You can tell if you did a good job selling if your new client feels relieved that they hired you rather than feeling as if they just sold their soul to do business with you.

As you read through this section, highlight the points that resonate with you. Make a sub-list and be sure to reference it frequently. The items you choose to utilize this section should be memorized and practiced until they become natural. You want to follow these steps each time you sell.

Be prepared—Learn as Much as You Can up Front

Ideally you should be prepared for a sales call. If you receive an unsolicited call for your services, it is impossible to do specific research about the prospective client prior to initial contact.

This does not mean that you are unable to learn about a typical person that purchases your services in advance. This is especially true if you focus on specific areas relating to your field.

There may be a specific type of client that seeks your particular service. If this is the case, it makes sense to learn as much as you can in advance so that you are able to reduce the time necessary to discover the caller’s “pain” (see **Quick Reference Guide**).



If you have the opportunity to make a sales appointment in advance, you have the opportunity to do specific research on your prospect. Do not be afraid to look at social media sites (i.e. LinkedIn and Facebook) to not only learn about the potential client's business but to learn about their personal interests and use this information to bond.

Be sure not to overreach by mentioning that you were stalking them on the internet. Rather, use the information you gained in a subtle manner. Mirror them in your sales process (see **Quick Reference Guide**) . If someone feels that you share common interests, they will be more likely to trust you. People do business with people they trust.

Does the Scope of Work Warrant the Professional Fees?

Before you begin the process of prequalifying a prospective client, you need to set parameters as to the level of work you are willing to complete within a price range. It may seem uncomfortable but try and setting a price that is higher than what you would normally charge.

Do not take on work that does not benefit you financially. If a job is too small for you to handle, you want to disengage your prospect as quickly as possible.

You are much better off discovering this information in a 10-minute prequalification interview rather than spending hours interacting with the prospective client only to find out the project itself is not worth your time.

Do Not Rely on Your Sales Materials

It can benefit you to have high quality marketing materials to use in support of your sales process. Even if you sell your services over the phone, you still may be given the opportunity to follow up by providing a prospect with materials that reflect your level of professionalism.



A professionally designed four-color brochure shows that your company earns enough to allow for a marketing budget.

Providing materials such as brochures, promotional giveaways and PowerPoint slides may help impress a prospective client, but they will not make a sale.

Remember, people will hire you because they trust you. Having a beautiful brochure will not gain a prospect's trust. Even worse than relying on attractive sales materials is providing sloppy ones. You are better off having nothing to hand out rather than providing a client with something that looks bad or has misspellings.

Find out What the Prospect Needs Before Deciding What to Sell

In order to be a successful salesperson, you first need to first understand what it is that you are selling. It seems like it the answer is obvious.

But when someone asks you what it is you sell, your answer should differ depending on who is asking the question. If you are asking yourself this question, the answer is not your professional services. Rather, it is trust and peace of mind.

If you can prove to your prospective client that you can overcome their pain, you have become an effective salesperson. It takes time to be able to master this task, do not become frustrated if you do not succeed right away.

Note that it takes time to learn this process. That does not mean that it is difficult to do so. If you are patient and in the proper mindset, you can become a successful salesperson with minimal effort.

The good news is that you will see results early on and will continue to do better as you perfect your skills. The more comfortable you become, the less time it will take to improve.

Chapter 3

Initial Contact

Have you ever heard the expression, **You only get one chance to make a first impression**? This phrase is extremely relatable to sales. You usually have just one opportunity to make a sale. Assuming your sales process involves more than one meeting, it is still imperative that you create enough interest in the initial meeting to keep the prospect interested enough so that you are engaged in subsequent meetings.

There will only be one meeting in which you actually have the opportunity to sell. Make sure you know which meeting this is and have the right people in the room.

Learning how to traverse the seemingly complex sales process does not come naturally to most. On the other hand, this skill does come naturally to some. The most natural salesperson I know is my father, Michael Cohen. My dad was born and raised in Kansas City Missouri. He moved to California to attend college. He graduated with a degree in engineering from California State University Los Angeles and remained in the greater Los Angeles for the rest of his life and all of mine. An anomaly to most, my dad was a natural-born salesperson.

For those of you that know engineers personally, you would assume that someone wired to be an engineer would not be cut out for sales. This is absolutely true. Although my dad receive a degree in engineering, he was born to be a people person. My dad was the kind of person that was never afraid to strike up a conversation with a stranger.

As a sales engineer, my dad traveled a lot. Once he was walking down the long concourse at the LAX airport coming back from a sales meeting. If you have never been to LAX, picture a hallway about a mile long that takes you from your gate to the baggage claim area. In this particular trip, he was walking down the corridor when he came across Robert Redford, the actor. Mr. Redford

looking down, appeared tired and seemingly anxious to grab his luggage and leave the airport.

My dad, walking as briskly as he could without making a scene, caught up with Mr. Redford and proceeded to walk alongside him. After walking side-by-side for a minute or so, my dad turned toward the fatigued actor and said “I have the funniest feeling everyone is looking at me”. His few words were enough to cause Mr. Redford to lift his head and smile back at my dad.

My dad was a salesperson at heart. Having the ability to talk to strangers allowed my dad to sell with little effort. This did not mean that he was able sell without having knowledge of how to read people. He clearly had a head start but also worked hard in the other areas necessary to sell successfully.

For the rest of us (myself included), this skill must be learned and practiced. Anyone can perform sales if they know how to read people. In this section you will learn how to begin the process.

"Yes" or "No" is Acceptable, "Maybe" is Not^{xvii}

When a person commits to the time you will need to discuss their issues, make sure you that you that time wisely. With the tools we provide in this guide, you will learn to prequalify a lead, have a productive discussion and know by the end of the call of you have made the sale. Do not let the person you are speaking with walk away or hang up without providing you with a definitive response as to whether or not they will hire you.

Nothing is more frustrating than having to spend a substantial amount of time with someone only to have the phone call or meeting end with them saying **I'll get back to you** or **let me speak with my**

spouse to make sure we can proceed. If the decisionmaker is not on the call, you need to reschedule for a time when they are available.

Start off the conversation by explaining how the meeting will progress. Once you have set the guidelines for the call, you will then follow up by making a simple request.

Ask your prospect to agree to either decline if they are not interested in your service, or to accept your proposal today if they are interested. Be sure to mention the **no** before the **yes**. This lays a foundation of trust and minimizes any pressure they may feel. Also mention that **maybe** is not an acceptable response.

If you follow these steps, you will determine whether the caller is fishing for free advice or is serious about hiring someone you in a fairly short period of time.

Do not mention pricing until the time is right. If the prospect asks about price, do not take the bait. Make them wait until you are ready.

Address "Buyer's Remorse" Up-Front

If you have ever negotiated a large-ticket item such as buying an automobile or renovating your home, there is a good chance you encountered buyer's remorse. At least on some level.

Even if you have never experienced buyer's remorse personally, you have probably had to address it at some point. In California and I assume elsewhere, if you enter into a home improvement contract, the building contractor is required to give you three days to change your mind. This is required to address undue

pressure from the salesperson as well as subsequent buyer's remorse.

On the other hand, automobile dealerships make you sign a document indicating you are aware that there is no rescission period. In this case undue pressure is not their responsibility and buyer's remorse is on you.

If you sell based upon easing one's **pain**, your buyer should not experience remorse. In fact, they should feel relieved with the idea of moving forward. This is accomplished by removing the underlying concern that caused them to contact you in the first place.

To ensure you minimize the chance of buyer's remorse, post-sell the prospective client, if necessary (see **Closing the Sale**).

Be Mindful of How the Prospective Client Perceives YOU

When a prospective client first contacts you, they are often under a tremendous amount of stress. Even if their situation does not warrant the undo pressure, they will often place it upon themselves.

In our business prospects may have had their bank accounts levied, their wages garnished or may have received notices threatening the same. In these cases it does not help if you are

perceived as just another salesperson looking to cash in on someone's unfortunate situation.



A prospective client is going to want to know that you are looking out for their best interest. To illustrate, there are several former IRS agents that go into the tax resolution business. They market their previous experience with the IRS. They explain how their previous experience will benefit someone under the pretense that they know more about how the IRS works than other practitioners.

While this angle may help promote someone as an industry expert, it will not close a sale. Any positive effect gained by marketing this point is outweighed by the public's perception that the IRS is difficult to work with. The point is, a salesperson should not guess what their prospect wants to hear.

Your goal is to have the prospect see you as their advocate, not an obstacle. This is why it is crucial that during your initial consultation you not only demonstrate your ability to solve their

problem (on a basic level), but just as important if not more, you must convey that you represent their best interest.

By doing so you effectively demonstrate that you are there for them. This can mean the difference of closing the deal or losing it to a competitor.

Don't Solve the Problem Before You Gain a Client

This principle comes up more than once in this guide. This is because it cannot be stressed enough. Your job as a salesperson is not to educate the caller. Rather it is to sell peace of mind and trust. Most prospective clients are liars. This may sound harsh but it is true.



Salespeople have built a negative reputation over the years. Many consumers do not hesitate to take advantage of a salesperson

as they construe them as the **enemy**. Where they may be more apprehensive to mistreat someone in other situations, salespeople are fair game. The purchaser assumes a salesperson is lying and will do the same to you to gain an advantage.

They may indicate that they are ready to proceed in the first 5 minutes of a conversation when they are actually just looking for free advice.

As a salesperson you want to be genuine without providing too much information. If you ease a prospect's **pain** too much too soon, they may not proceed with your services. You will lose the sale if you remove their motivation to hire you. Once they become your client, you will have ample opportunity to show off. Save it for later.

Don't Waste your time with Wishy-Washy Prospects^{xviii}

Remember that **buyers are liars**. If your prospect is serious about needing your services, using these principles you will improve your chance of closing a sale (see **Quick Reference Guide**).

If they are just fishing for free advice and have no intention of buying, you have no chance to close the sale. In addition to finding out if the caller is intending to buy, you need to determine...

- If the prospective client can afford your services, and
- If the scope of work falls within your wheelhouse.

DON'T WASTE TIME SPEAKING WITH SOMEONE THAT IS NOT INTERESTED IN PROVIDING YOU VALUE. Your time is too valuable.

Find Out What is Causing the Pain^{xix}

The theory that sales guru David Sandler^{xx} based his sales system on is finding a prospective client's **pain**. **Pain** may stem from something tangible such as, the IRS levying a taxpayer's bank account.

In this particular case the **pain** the caller is experiencing is most likely not the bank levy itself but rather it relates to what he or she is unable to pay for by not having the funds available. It may also relate to the fact that a spouse or work colleague will find out that they have a tax problem.

Other types of **pain** may not be as obvious. For example, someone may be looking for a new insurance agent because theirs is about to retire. In this case the pain they feel may stem from their concern that the new agent will not treat them with the same level of service to which they have become accustomed. Regardless of where someone's pain point lies, let them be the one to tell you. Do not guess as you will probably be wrong.

Listen 70 Percent of the Time and Talk 30 Percent of the Time^{xxi}

Let's start out this section with an exercise. Read the following question and answer it to the best of your ability before you read on.

What is the main reason a prospective client calls you when considering enlisting your services?

Spoiler Alert...

The answer is...only the caller knows. Sales guru David Sandler^{xxii} determined that in order to maximize the chance of closing a sale, you are better off listening rather than talking. His principles suggest that a salesperson listen 70 percent of the time while speaking only 30 percent of the time.

The idea here is that you should find out what motivated the prospective client to call you and **let them tell you** what you need to do to ease their pain (see **Find Out What is Causing the Pain**).

No matter from where their source of pain comes, let the prospective client tell you. If you try and make a guess, you have almost no chance of getting it right.

Set up an Appointment if "Now" is Not the Right Time

When you first engage someone you want to make sure you have their undivided attention.

Just as important, you want to ensure that both of you set aside enough time for you to complete the sales process. You need to maximize your chance of soliciting new business.



Before you provide any information, ask the caller if they have 'xx' minutes (where 'xx' is the amount of time it takes you to complete the sales process) to spend with you to discuss their case. Without doing this you take the chance that they are fishing for information and may cut you off once they receive the information they were looking for.

By making them commit you gain two things...

- First you ensure that they are willing to spend the amount of time you need to properly sell your services
- Second, you determine at least at some level whether they are or are not serious buyers

If the prospect tells you they do not have enough time to speak right now, make an appointment for a time in the near future. Make the time and date specific to keep them honest and on the hook.

Try suggesting two specific alternatives. For example, "Are you available to speak tomorrow at 2pm, or are you available at Thursday at 10am.?" Even if they seem to have time right away, you may suggest setting up an appointment for a later time just to see if they are willing to commit to said time in the future if they do not come across as serious buyers.

In addition, you may consider setting up an appointment to try and meet the prospect in person. There are advantages to meeting in person. These include being able to assess someone's body language. Given the opportunity, you want to turn a phone call in to a live meeting for a prospect that stands to provide you substantial business.

Use a Monkey's Paw to Gain Trust^{xxiii}

For hundreds of years, sailors have used a **Monkey's Paw** to assist them. This tool is a rope and hook used to tie down their ships when they come in to dock. Large ships need large ropes when docking to ensure they stay secure. These ropes are very heavy and hard to handle. A **Monkey's Paw** is a much smaller rope with a ball tied to the end of the larger rope needed to secure the ship.

A sailor onboard throws the **Monkey's Paw** to someone else ashore so they can accurately reach the intended recipient. The recipient then pulls in both the small and much larger ropes so that they may tie down the ship as intended.



Sales guru David Sandler^{xxiv} is credited with creating the analogy relating this rudimentary but effective tool to fit into a sales situation. If you are selling a service that requires a substantial financial outlay or a great deal of time for your prospective client to invest, you may have more difficulty than would otherwise be the case in closing the sale. You should consider offering a down-scaled version of what your client needs: a **Monkey's Paw**.

For example, if you are proposing to complete work for a client that will require hundreds of hours (assuming you bill on an hourly basis) to complete, you may have a higher hurdle to overcome and get some pushback. If this is the case, consider having your prospect hire you to investigate options for a nominal fixed fee. This will allow you to gain an adequate level of trust that you would otherwise not have been able to obtain in your initial consultation.

Typically, a client will continue with your services in this case. If you were diligent in completing your scaled-down task (even if it was small), moving forward will be easy. Be fair with your pricing in the initial stage of your engagement.

Chapter 4:

**Sizing up the
Prospective Client**

You should be more concerned about how a prospect views you than what you think of them. I again refer to my father, Michael Cohen. My dad was educated as a mechanical engineer but hated it. He was a people person. As a compromise, he took a position as a sales engineer. Once, when my dad was selling fiber optics, he set up an appointment with a prospective client. The appointment was in the afternoon following lunch.

If you are familiar with fiber optics, you know that they are strands of material similar to glass. When these strands are combined, many things can be accomplished. I remember my dad showing me how a tube of rubber encased fiber optics could pass light even when bent. I also remember being able to see around corners with the same device. As part of his sales presentation my dad would point one end of the fiber optic rope at a prospect, bend the other end around a corner and have the person look at him. It was pretty cool.

This demonstration garnered amazement from almost all of his presentation's recipients. I say almost all because there was one exception. On the day he had an appointment after lunch, my dad went on his way to meet the client. He started his presentation and proceeded to place one end of the fiber optic rope in front of his prospective client. To his surprise, the client lurched back.

Confused, my dad again placed the viewing end of the fiber optic rope in front of his prospect. Again, the prospect lurched back. My dad was confused. Was the instrument broken? Was the prospect afraid of fiber optics?

In order to determine what was bothering his hopefully soon-to-be client, my dad proceed to look into the scope itself. It was at this point that his stomach dropped. He figured it out.

His hands wreaked of chili. For those of you familiar with Tommy's® in Los Angeles, you understand that it does not make sense to pass up Tommy's® when given the chance. That is unless you have an upcoming sales appointment.

While the burgers are delicious, Tommy's® chiliburgers (with onions) leave a distinct odor on the hands. Unfortunately for him, my dad had decided to eat at Tommy's® without considering the repercussions. He learned his lesson the hard way.

By the way, if you ever in the greater Los Angeles area, we highly recommend you try Tommy's®. Just be sure not to visit right before a sales meeting.

Ask Open Ended Questions^{xxv}

Once again, let's look at how to uncover a prospect's **pain**. Uncovering **pain** is the highest priority in determining what your prospect needs to close a sale. To do this you need to let the prospect talk openly.

If you ask only **yes** and **no** questions, you will get one word responses. A single word provides very little information. You are much better served asking open ended questions. These should be followed up with additional transition questions (see **Quick Reference Guide**). Asking questions of this type will get the prospect to open up and expose their concerns.

Become an Active Listener

When it comes to selling, plain old listening is not enough. In order to be effective, you must actively listen. What do we mean by actively listening? In addition to hearing what a prospective client is saying, you must make sure you understand and interpret what they are telling you.



The ideal way to ensure this is accomplished is to confirm what you just heard. For example, a prospective client says “for the last 3 years we have had trouble filling our orders on time.”

Listen to what they say and try and lead them as to what issues the actual problem is causing. To do so, you can reply with something along the lines of “Just to clarify, you are saying that the orders continue to come in and you stand to benefit from improving your fulfillment process. What do you need to make that happen?”

By restating their concern, you demonstrate that you are not only listening to what they are telling you but also thinking of ways to help them resolve their concern to put them at ease. Remember, selling when done properly is accomplished having the prospect sell themselves.

Be Honest—Don't Try to Sell a "Bill of Goods"^{xxvi}

Have you encountered a situation in which someone tried to push a product or solution on you that you know would not work? When you let the salesperson know that the product or service does not meet your needs, the salesperson attempted to compensate by making claims that you knew were untrue.

What did that do to your willingness to continue the sales process? Did you feel you could trust them? Would you ever go to them again if you need assistance in the future? Most definitely not.

It is important that at all times you be honest with your prospective client. If your product or service cannot solve their problem and does not provide benefit be up front about it. You will not waste time and end up with an unhappy client.

Instead, if available offer an alternative product or service. Maybe even refer someone else that can provide the solution to best serve their need. This may not yield an immediate sale but will do much more. The prospective client will see you as a valued partner that they know they can trust. When the next opportunity arises, they will think of you first to meet their needs.

Buyers are Liars

Have you gone to purchase a product and had the feeling that the salesperson was lying to you? If so, you can imagine what the person calling you assumes when you are conducting a sales call. People tend to distrust salespeople. They think it is okay to lie in return.



Although they may not be forthright when they contact you, many consumers call professionals solely to obtain free advice. Others have made up their mind to hire someone else but still call you to confirm that a price they are about to pay is fair.

In either case, the buyer will not tell you the truth. More likely they will lead you to believe the need and will pay for your services. For this reason you must pre-qualify (see **Quick Reference Guide**) your potential client. Assuming that you determine they are worthy of your time, you may then proceed in gaining their trust and confidence. That is trust and confidence in you, not your services.

Can the Prospective Client Afford to Pay Your Fees?

For most of you, providing services falls within your comfort zone. Because of this, discussing your services becomes the path of least resistance. It is natural to provide advice without first discovering if a lead is able to afford your services.

We are taught in society that it is impolite to talk about money. In sales it is foolish to go down a sales path without discussing if your services are affordable. As a buyer you would not hire someone without knowing what you expect to pay. The same goes for the person contacting you.

If the roles were reversed you would be happy to extract free advice from the professional with whom you are speaking. Keep that in mind when you are selling to a prospective client. Without being rude (or providing them direct price quotes up front), determine if they can afford your services. If so, you should charge them based on the amount that they value your services. Not the other way around.

A couple of questions to ask pertaining to money include...

- What are you paying for this service now? Or
- My services are something that most people don't budget for...have you put money aside to get this work done"

Demonstrate That You Are the Best Option to Ease the Pain

Questions buyers ultimately ask are...

- Do I want to buy from this person? Or
- Do I trust this person enough to buy from them.

This is why the impression you make on a buyer is extremely important. You must be personable, sincere, inquisitive and most importantly understand and care about the prospective client's needs.

Being sincere and empathetic to their needs will make the difference between being a successful salesperson from someone that randomly closes a sale.

Determine Where in the Process the Prospective Client Lies^{xxvii}

When first engaging a prospective client, salespeople assume the buyer is just getting started. They neglect to determine where in the buying process the prospective client lies.

You may be interacting with a buyer for the first time, but that does not mean they have not begun to travel down the path prior to speaking with you. There may be an emotional investment the prospect has already initiated.

How do you determine this? Simple. Ask them. You start with questions, such as...

- What steps have you taken so far in your decision making process?" or
- Can you share with me how you will determine who you are going to hire for this task?

In asking these questions you are gauging whether the prospect has just started thinking about hiring someone or if they are further along the decision process. This also helps determine how serious they are in moving forward.

Just as important, you will determine if the caller has already met with the competition and are now just shopping around. Loaded with this information, you can tailor your presentation accordingly. This way your sales efforts are most effective.

Don't Argue with the Caller—You're Guaranteed to Lose the Sale^{xxviii}

During a sales presentation there are times something comes up that leads to a disagreement. What seems obvious to you may be seen opposite to someone else.

One factor to consider when speaking to a prospect is that although you may disagree on a fundamental process or approach, it will not serve you to argue your point. You are more likely to make them upset.

If you think it would help diffuse the situation, you may politely ask questions to try and get them to see your point of view.

Remember that the caller is looking to ease their pain. The last thing you want to do is cause more. As hard as it may be to let go, you must refrain from expressing an opposing view from the prospect.

Listen with an open mind. If you remain calm at all times it will help you rationalize the situation better. Your goal is to gain this person as a client, not win an argument. Again, you are seeking an opportunity to communicate to discover their **pain** and show you can ease it.

It is important to note that arguing with your client and disagreeing with them are not necessarily the same thing. In some cases showing that you have an alternative opinion can help you gain trust. If you have a constructive suggestion, go ahead and politely steer them in the right direction.

For example, a prospect may indicate that your approach to solving their issue will not work. If this occurs, you can provide a concrete example of a prior success you accomplished. However you handle the situation, always be polite. Under no circumstance should you teach them how to do your job.

By acting combative, you both place doubt into their mind and this will work against you every time.

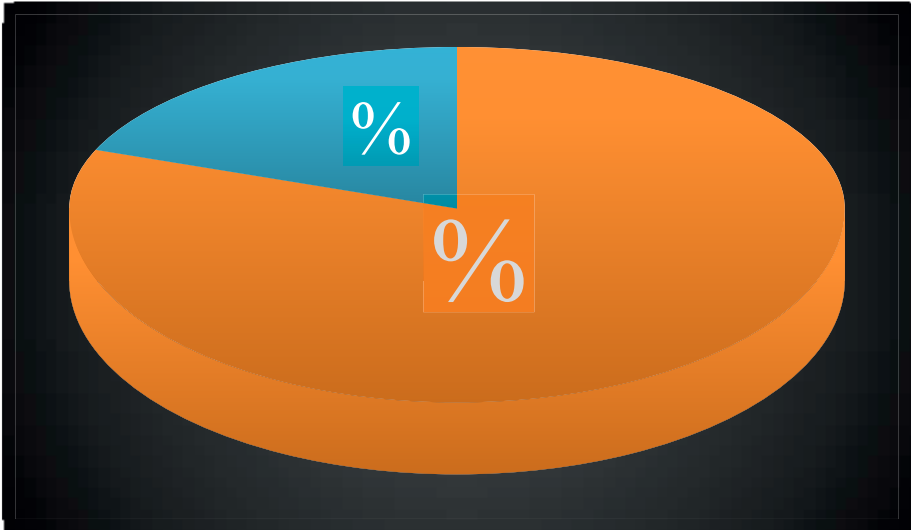
Gain the Prospective Client's Trust by Expressing Sympathy

It is a crucial part of the sale process to build trust. Without trust, closing a sale becomes a random occurrence. You are probably wondering how you build trust. One effective way doing so is to sympathize with a prospect. This can be accomplished by mirroring what they say and do.

Discussing similar personal experiences is a good example of how to mirror. To put it simply, mirroring is putting yourself in the caller's shoes and let them know you share their **pain**.

80 Percent of Revenue Comes from 20 Percent of Clients (the 80/20 Rule)^{xxix}

Studies show that 80 percent of a company's revenue comes from 20 percent of their clients. This is important because it indicates that a company should focus on the bigger fish. The same can be said for a salesperson or sales team.



This is not to say that you should ignore smaller prospects. Rather, you should use your selling time wisely. This principle is very effective when used to weed out unqualified buyers. This way you know which clients rise to the 20% level more quickly.

Once you become a star salesperson, you will use your time even more effectively. This way you can focus on potential clients that stand to pay your higher fees.

Learn How to “Read” Your Prospect^{xxx}

It would be nice to have a crystal ball to see what a prospect is thinking. If you could get into someone’s head you would know exactly what to say.



You may not have a crystal ball, but you can discover a lot using this system. To illustrate, try examining one’s body language. This is a natural way of seeing what someone is thinking. If during your presentation you notice that the purchaser crosses their arms, you probably said something to which they disagree. The same can be said if you see them leaning back in their chair. At this point you should pivot as you are beginning to lose them.

On the other hand, if they lean in toward you, you have their interest. If they are asking questions this means that they are engaged. In this case keep doing what you are doing as they are interested in what you have to say.

There are several verbal and non-verbal signs to look for when communicating with potential clients. If you master reading these cues, you will become a successful salesperson.

Make Sure You Are Speaking to the Decision-Maker

One of the first questions you should ask when beginning a sales call is, "If you are happy with what we discuss today, can you alone decide to proceed with my services?"

In this particular instance notice that we are referring to a sales call only. If you are meeting in person, this question should be answered in advance over the phone. In any case, if the answer is **no**, you need to get the decisionmaker in the room or on the phone.



It is also important to note that in your question, **you** may be a group of people and **my** may include your colleagues. We mention this because it does not make sense for you to do a pitch without the decisionmaker in the room or on the phone. You are in the business of providing professional services. You do not have the time to make multiple sales pitches to unqualified recipients. Even if you did, meeting more than once works against you.

If your prospect replies to your question with "My boss needs to make the final decision but I am narrowing down the candidates", you need to politely state that you will discuss your services with both of them when the boss is available.

You may get some pushback from this person initially but the boss will respect you for insisting he is included. Do not come across as disrespectful toward the person with whom you are speaking. Your goal is not to win an argument but rather to close a sale.

Be an Advocate for Your Prospective Client^{xxxii}

When a prospect decides to pick up the phone, you have to be careful to make them feel comfortable. You want to ensure them that you are the right person to resolve their problem and ease their **pain**. You must continue to make them feel this way throughout the sales process. It is not unusual for someone to be facing a great deal of stress when they contact you.



Even when purchasing something that will bring joy to someone such as a new car or new house, the process remains scary. You need to come across as the person here to help your clients, not here to make a buck.

Mimic the Prospective Client^{xxxii}

Let's assume that the service you provide is the best on the market. Just knowing this will not equate to making a sale. You need to show a prospect that they need you. This is not done by proving you are the best.

Rather, you need to engage the prospect to make them feel comfortable with you. This can be accomplished by mimicking their speech and matching their tone patterns. In essence, you need to speak their language.

To illustrate, you may be interacting with someone who speaks very fast. This type of person tends to use descriptive adjectives. If you reply by speaking slowly or do not go into detail, the caller will become impatient and lose interest in continuing the conversation. If you mimic the way they communicate, you will make them feel comfortable and have a much more productive sales call.

Understand the Caller's Goals^{xxxiii}

When conducting a sales call, the salesperson will often focus on what they assume to be the caller's immediate need. They end the call before never getting around to determining what the overall goal of the call is and subsequently do not end up focusing on a long-term plan to ease the **pain**.

Imagine how much more effective you would be if ahead of time, you knew the ultimate goal of the prospective client. You would know how to act and what to do to meet their current needs and how to gain their future business. You must ask the right questions in order to determine what the caller is seeking. Do not be shy. Share your goals with them (assuming they align with what the caller is looking for). Mention that it appears you share long-term goals and tie this into building a long-term relationship in order to gain trust.

After all, the primary goal of many professionals is to build lasting relationships with clients. Tying this idea into your sales process makes perfect sense.

Ask Open Ended Questions^{xxxiv}

A successful salesperson is versed in asking open-ended questions. Open-ended questions not only move conversations forward but also yield valuable information. If asked properly, these type of questions will get a prospective client to talk in detail about their concerns.



If you examine this process, you will see that these types of questions stop the salesperson from speaking when it is the caller's turn to speak which should be at least 70 percent of the time.

Examples of good open-ended questions include...

- Why?
- Tell me more
- Share an example with me
- Can you explain that further? and

- Do you have any examples?

You should be asking no less than 10 open-ended questions throughout your sales process in order to truly understand your prospective client.

WIIFM (What's in it for me?)^{xxxv}

You may have heard this expression before or even asked this question yourself. Most salespeople forget that they need to put the need of the caller first. That is, to put themselves in the prospective client's shoes. If anyone is going to ask, "What's in it for me?", it should be the prospect.

You should assume that in every interaction you have with the caller they are asking this question. By focusing on features and benefits rather than addressing the caller's pain, you will push them away every time.

Why Did They Call You TODAY? Determine Their Pain

If a client is calling you to speak or set up a time to come into your office, you should assume that the timing of their call was not random. Something motivated them to pick up the phone this day and call you. Something specific motivated them to take the initiative. Determining what that **something** is the key to making the sale.



You need to pinpoint their motivation. This is what is commonly referred to in this book as discovering their **pain**. To illustrate, if you are an attorney and someone calls you to represent them, it is obvious that there is a legal matter at hand. Understanding that the legal matter is not the reason they are calling you is key.

If someone is getting sued, they are scared. Not necessarily scared of getting sued as much as what consequences will come from the suit. For example, someone may be afraid that their spouse will find out and is going to divorce them.

Others may be afraid that they will lose an important asset such as their home. Once you find out what is causing their pain, you can ease it just enough to close the sale. You are the prospects solution, not your services (see **Quick Reference Guide**).

What to do if the Caller's Project is Too Large to Handle

Once in a while someone will come to you with a project that is outside your wheelhouse. What we mean by this is the project is too large for you to handle. We suggest you do not to cut them off right away. Rather, you may want to continue the pre-qualification process to determine you are reading them correctly.

Assuming your first impression was correct, you should indicate that you want to research their situation further and set up a time in the near future to follow up. Once off the phone, see if you can find someone that can handle the case. When you get back on the phone with the prospect, you can either let them know this type of work is outside your comfort level and refer them to a colleague, or you can work with the colleague side-by-side.

By not cutting off the prospect in the initial call, you at the very least act as an advisor. Doing so may lead to future work directly from the prospect or possibly secondary referrals. You also maintain a level of professionalism that may otherwise be lost if you appeared to be unable to assist the prospect

YOU Should be the Only Person Leading the Conversation

A successful salesperson listens more than they speak. This is an extremely important part of the sales process. Even though you limit what you say, you still must control the conversation. By doing so you steer the conversation in the direction that meets your needs.



Do not let the prospective client go off on a tangent. This causes both of you to lose focus. You want the caller to provide you with information that lets you know how they are feeling.

Prepare in advance by crafting questions (see **Quick Reference Guide**). These questions will push the conversation along the path you have laid. Following the path will allow you to close the sale.

Chapter 5:

Closing the Sale

Statistics show that most people that sell are most nervous when it comes to two things...

- Discussing price, and
- Closing a sale

Let's focus on my dad, Michael Cohen again. Back in the '70s and '80s my dad held various sales positions. He was a phenomenal salesperson. My dad was able to secure several new accounts. As time elapsed, he moved onto better positions and commissions continued to grow.

In one of his jobs his sales manager decided that he did not like the fact that my dad was earning more than him. So he proceeded to let my dad go.

Based upon his ability to sell, it was not long before my dad secured a new position with a competitor. Several months after starting the new job, my dad received a call from the person that replaced him at his prior company. He asked my dad to lunch.

Curious as to why, my dad accepted the invitation. About five minutes into the conversation, his replacement asked my dad what he did to succeed in that position. It turns out the new guy was having trouble selling. His boss suggested he contact my dad based upon his prior success.

The items being sold at both companies had a high price point. As if that weren't enough, they also had a narrow focus of application. My dad understood this and was nonetheless able to find his client's **pain**. As a result, he sold plenty of product.

As a true professional, my dad offered the young man some sage advice. He suggested that if this guy wanted to succeed, he work hard and keep his nose to the grindstone. Obviously my dad was not anxious to help his replacement which, we assume was not long for the sales world.

Ask the Right Questions

When selling it is important to remember to focus on your ultimate goal. Are you looking to teach the caller about what you do? Are you looking to listen to their life story? In either case, the answer should be **no**. You are trying to have them purchase your services.



You want to do this in a way that is both efficient and effective. You cannot just pick up the phone, say **buy my services** and expect to close a deal.

You also do not want to invest hours or even days working with someone only to find out that they are not going to use your services. Just as bad, you may discover that your cost to recapture your time outweighs the profit you stand to make in getting the deal. As you have read throughout this book, you need to listen 70 percent of the time and speak no more than 30 percent of the time.

The question is, “What do you say in the short time you have to speak?” The answer is, you say little to nothing. Instead of saying anything, you should spend this time either steering the conversation by asking questions.

These questions will guide your prospect. They will provide you with the information you need to make them a client (see **Quick Reference Guide**).

Once again you want to find out what causes their **pain**. A properly phrased question is the best way to do so. Some questions you should ask include...

- How does that make you feel? Or
- Are you okay with that?"

These questions will garner an emotionally based response. Asking the right questions can greatly increase your chance of closing a sale.

Be Careful When You Quote Pricing

Without a doubt, a call will ask you to give them a price. It is important not broach pricing too early in the sales process. Remember you need to gain their trust and confidence by finding their "pain" (see **Quick Reference Guide**) before you can discuss sensitive issues such as pricing.

If you give them a price too early, you will not only fail in gaining their trust, but you will also lose their attention as it relates to everything else moving forward.

Discussing money is a sensitive subject. If handled poorly, you will lose the sale. When quoting a price, there are a few different approaches you may take. The first approach involves offering a price range. Be careful when using this technique. Many consumers process a price range in the following manner.

Assume you have reached the time in the sales process when you should discuss pricing. This happens to be soon after you discover the pain. At this point, you briefly discuss how to ease the **pain** which gains the prospect's trust. Also assume that you have followed the prequalification step to determine that the prospect can afford to pay you.

You are now ready to discuss pricing. You may say...

"To do this type of work, it typically costs between four and five thousand dollars."

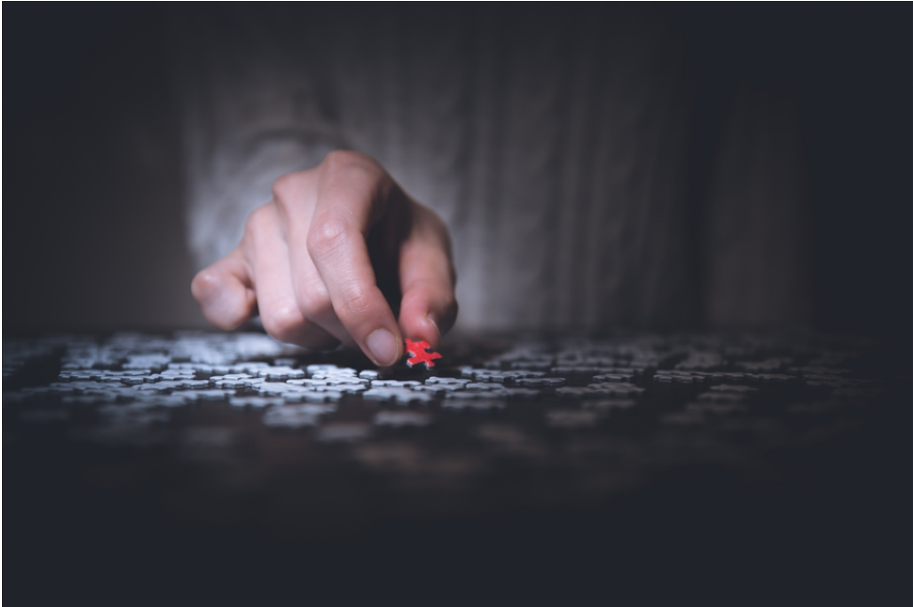
You must understand that what the caller typically hears is that you will do the work for 4,000 dollars. If you are willing to do the work for this amount, this option may work for you. Otherwise, we suggest you not offer a price range.

Rather, mention to the client that work of this type usually follows two different paths. While neither is simple, one involves less work than the other. If you can complete the work taking the path of least resistance, it will cost around \$4,000. On the other hand, if you need to take the more complex path, the cost is likely to exceed \$6,000.

Then ask them which path they believe you will need to take as it relates to their case. Regardless of their answer, sound surprised. By doing so you throw them off guard. At this point price will not be as important to them.

Focus on a Permanent Solution

This needs to be considered carefully. When we say **permanent solution** we are not referring to providing a solution to their surface problem. Rather, you need to offer to ease their **pain**. The permanence comes from keeping that pain from coming back.



Remember that people call you because they have an underlying issue (**pain**). That issue needs to be resolved for them to feel satisfied.

To illustrate, assume that someone has been sued. The contact you to inquire about representing them in the lawsuit. You will not make them feel better by explaining how you plan on navigating the legal proceedings. Rather, you need to determine what perils come from losing the lawsuit and focus on mitigating the chance of that happening.

It is important to remember that someone involved in a lawsuit is probably under a fair amount of stress. Although it may seem like the stress is related to the lawsuit itself, it comes from other things such as fear of losing assets or having one's spouse leave them if they lose.

Once you determine someone's **pain**, you must then convince them that you are able to ease the pain indefinitely. If you offer short-term comfort, the prospect's trust and confidence will fade away quickly.

Let the Prospective Client Sell Themselves^{xxxvi}

Do not mistake this concept as an excuse to be lazy. It should also not be mistaken as a new age hypnosis trick you perform to get prospects to hire you. What we mean by having the prospect **sell themselves** relates back to a few principles covered earlier in this book.

The easiest way to accomplish this task is to let the prospect speak at least 70 percent of the time. By doing this, you are able to determine what motivated the person to contact you. Once you know this, you can use the information to your favor. Unless you can enter into their psyche which is impossible, there is no way you alone can determine what will persuade the caller to hire you. Your job is to steer the **sales** ship. Not to fuel it.

Using the right questions (see **Quick Reference Guide**) you will not only see that the caller will provide you with the source of their pain, but they will also give you clues as to what you should offer to make them feel better.

As an reminder, you need to remember that during the sales process you want to mention that you **will** make them feel better by enlisting in your services. Be careful not to take away their pain before they become your client.

Place Just the "Right" Amount of Pressure^{xxxvii}

To become a successful salesperson you must know how to navigate the selling process from start to finish. This means knowing when to speak (30 percent of the time) and knowing when to listen (70 percent of the time). The process we use to gain new clients relies on finding their **pain**.

Once the pain has been discovered, getting the prospect to trust you will eliminate their pain. The key to focus on is convincing them that you **will** eliminate the pain. Do not provide them a solution during the sales process.

Let's assume you are on the right track selling to a prospect. You need to walk a fine line between promising to make them feel better and making them feel better right away. If you make them feel better before they become a client, your call or meeting will most likely go cold and you will lose the sale.

By no means do you want to pressure a client into enlisting in your services. If you pressure someone and they agree to proceed under pressure, the chance of keeping them as a client lowers immensely because they never gained their trust.

Rather you should use the pressure that they place upon themselves as leverage to gain trust and confidence.

Post-Sell if Necessary

Having a client commit to you verbally and signing on the dotted line are not always the same thing. For those of you who do not begin work right away, you need to maintain the trust and confidence you obtained from the client. You need to ensure you mitigate buyer's remorse.

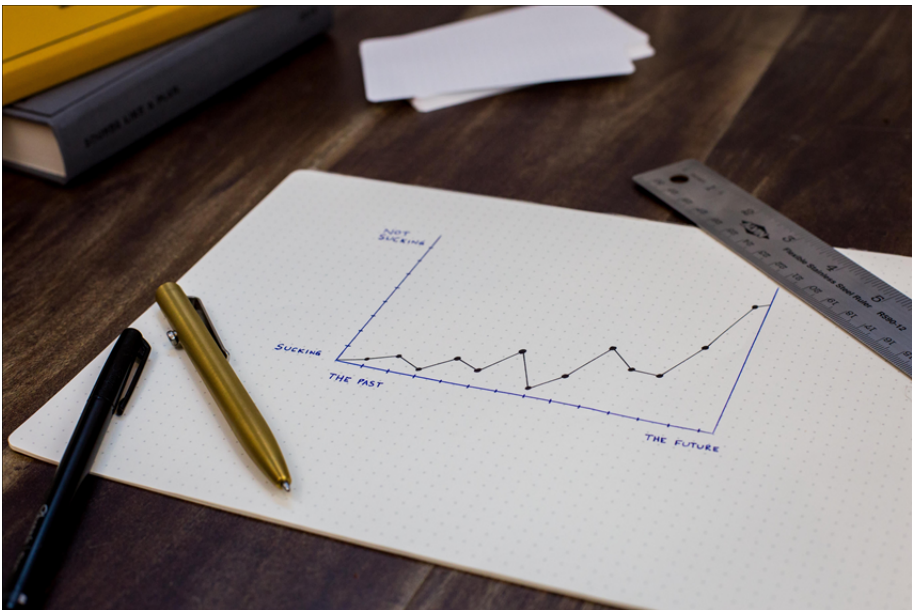
This can best be accomplished by making contact with the client soon after you close the sale. Be sure not to over contact the client.

For example, you may contact a newly signed client to layout your work schedule. This does not mean overwhelming them with timelines and demands. Rather, discuss with them what will occur up to the time work commences. You may also want to mention that their case file is being created and you are reviewing the documents they sent you.

This shows you are not going to forget about them after the check clears. It does so without stressing them out and scaring them off (see **Quick Reference Guide**).

Track your Metrics^{xxxviii}

Most people that sell will try and shoot from the hip. You will find in most cases a salesperson will "go with the flow" when it comes to the sales process. If you ask a seasoned salespeople how they are able to succeed, they will tell you that it is vital to set realistic goals and track your results on a regular basis.



Unless you track the process and measure the results, you will not know if your activities are fruitful. This is the most efficient way to determine how well or how badly you are performing. By gauging the results, you can...

- Adjust your process to perform better, and
- Adjust your goals to be more realistic.

To be specific, try and measure your results by tracking the number of calls you make/receive, the number of appointments you land, and the number of sales you generate. In addition to measuring sales success, this information can be used to help you manage your pipeline.

Quick Reference Guide

Creating Rapport and Bonding^{xxxix}

1. Match and Mirror—Tonality, Pace, Energy and Vocabulary
2. Discuss Points in Common
3. Empathize
4. 70/30 Rule—ASK QUESTIONS (lots of them)
5. Never be more “okay” than the caller is
6. Practice Active listening

Pain Questions (questions to find a prospective client's "pain")^{xl}

1. What is the problem?
2. Why don't you tell me what's going on?
3. Anything else?
4. How did that happen?
5. How did it get to this point?
6. How long has this been going on?
7. What have you tried to do about it?
8. What happens if it doesn't get fixed?
9. Are you OK with that?
10. Do you have kids?
11. Is this a joint liability?
12. What is your family size?
13. Any college plans for the kids?
14. How does that make you feel?

Post Selling^{xli}

1. After money is collected, thank the prospect for their confidence in allowing you to service them.
2. Address biggest question, concern or hesitation they have about hiring you.
3. Use statements like “before I run your credit card, something still concerns me, you mentioned I want to be sure you are comfortable with your decision”

Prequalify your prospective client

1. Are you speaking with the decision-maker?
2. Does the person with whom you are speaking have the time necessary to finish the sales process?
3. Will the caller give you a firm “yes” or “no” but not “maybe” at the end of your call/meeting?
4. Can the caller afford your services?
5. Does the scope of work sought by the prospective client warrant your fees?
6. Are you able to handle the level of work being sought?

Transition statements/questions^{xlii}

1. "Shall I start?"
2. Ask the reason they are calling you today.
3. What is at risk?
4. What is the exposure?
5. Determine what the consequences are of the caller's inaction.
6. First, uncover the surface pain and, subsequently, the deeper pain.
7. Ask "How does that make you feel?"
8. Ask "What should we do?"

Setting the terms of the call/meeting^{xliii}

1. Set parameters for the call
2. Agree on how long the call or meeting will take
3. Ask permission to ask questions of a personal nature
4. Ask them to agree to say “NO” if we are not the right fit
5. Ask them to agree to say “YES” and allow us to move forward with our representation if we are the perfect fit
6. It is not acceptable at the end of this call is to hear let me think about it or some version of that. Be Clear and make sure this point is understood.
7. Ask if anyone else needs to be on the call (Who besides yourself will be involved in the decision-making process?)

Glossary

Account

A synonym for client, this term is usually used in a business-to-business (“B2B”) context.

Active Listening

This term is used to indicate that the salesperson is hyper-aware to what the prospective client is saying and how they are saying it. This is often combined with interpreting body language in order to better evaluate a prospective client.

Added Value

This is accomplished by providing additional benefits (either tangible or intangible) to the primary product or service being sold. A top-notch reputation is an example of an added value.

Advantage

This is something (either tangible or intangible) that gives one an edge over their competition. Being referred by an associate is often an advantage over having someone call you out of the blue.

Advertising

This is the act of using a media outlet such as television broadcasting, magazines or the internet to market a product or service to prospective buyers/users.

Benefit

Similar to “Features” (see below) this term is used to describe the positive aspects of a product or service. Selling benefits is not recommended.

Brand

An intangible, this is what a company creates from several items to tie in with how they want to be perceived. Several items including logos, slogans and jingles contribute to a company’s overall brand.

Business to Business (“B2B”)

This term is used to describe transactions between one company and another company.

Business to Consumer (“B2C”)

This term is used to describe transactions between a company and a consumer.

Closing

This is the part of the sales process where the salesperson receives a commitment from the prospective client. This is often mistaken as the final step in the selling process.

Client

This is the person seeking the product or service being offered. We prefer this term over “customer” when selling services as it comes across more professionally. It is important to understand that the person contacting you to purchase may not be the true prospective client (see “Decision-maker”).

Decision-maker

This is the person who has been given the authority to enlist your services. Be sure you are speaking with a decision-maker when taking a sales call or meeting.

Deliverable

The item or items one commits to provide. These may be tangible or intangible.

Demographic

This is used to describe the make-up of one's living style. Among other things, this may include a person's job, hobbies, consumables, economic standing and education. It is helpful to know the demographic of your prospective clients.

Digital Media Marketing

Marketing a product or service via the internet.

Direct Mail

Using "snail mail" to market a product or service to a target audience.

Empathy

Having the ability to understand and share what another person is feeling. This is a valuable sales tool when trying to discover a prospective client's pain.

Ethics

This is the practice of acting within societal guidelines. Acting ethically over time will yield much better results than any short-term gain that may be accomplished by acting otherwise.

Feature

Similar to “Benefits” (see above) a feature is an aspect of a product or service that distinguishes it from other similar products or services. It is very difficult to sell a product or service based upon features.

Field

A term used to describe any location outside one’s home base be it an actual office or one’s residence.

Forecast

A synonym for “prediction”, this term is used to predict how well sales efforts will be. It is important to note that forecasting should be used as a loose guide as many outside factors can vary the accuracy of a forecast.

Influencer

This is a person or people with the ability to assist a decision-maker in choosing a product or service.

Intangible

In the context of sales, this is a non-physical attribute that relates to a product or service.

Introduction

In the sales context this relates to a third party bringing a salesperson and a prospective client together.

Listening

One of the most important aspects in selling, this trait must be practiced in order to obtain the best results. Just as important as listening is knowing how to react to what one hears.

Marketing

Often confused with sales and advertising, marketing is the process in which a company uses tools to make people aware of the product or service they are offering. This is done in hopes of having prospective clients placed in front of a salesperson to begin the sales process.

Profit Margin

This is the difference between what an item costs and at what price the item is sold. It is important to note that indirect costs such as taxes and overhead may or may not have been included in one's profit calculations.

Mark-Up

The amount added over the cost of a product or service attributed toward profit.

Negotiation

The act performed by a purchaser and a provider in which a compromise is sought by both parties. This process assumes the parties begin the process with differing goals. The better negotiator will usually end up closer to their original goal than a lesser skilled negotiator.

Networking

A highly effective means to garner new business by meeting with associates in order to refer business back and forth. These types of meetings are most effective when done face-to-face in a live setting.

Sales objection/s

Issue or issues a prospective client voices that is keeping them from purchasing a product or service. It is difficult to make a sale by directly trying to address individual objections.

Opening

The beginning stage of a sales call or sales meeting.

Perceived

This describes how a prospective client views a given item such as a product, a service, the salesperson or the company as a whole. Being able to influence a prospective client's perception is a valuable sales tool.

Presentation

The package a salesperson uses to address a prospective client. The presentation may include a pitch, visuals, slides (i.e. PowerPoint) and brochures. Although these tools may add some value, presentations do not sell by themselves.

Product

A product may be tangible or intangible and usually refers to what product or service the provider is offering.

Proposal

An offer (either written or oral) provided by the seller to the prospective client setting forth what will be delivered and under what terms.

Prospective client

A person or company that a provider deems may be interested in purchasing the provider's product or service.

Questioning

The point in the sales process where a prospective client raises objections.

Rapport

A bond created between a salesperson and a prospective client. Good rapport is often an integral part of creating trust.

Referral

A prospective client referred by an outside (usually trusted) source

Sales Pipeline

A term used to describe where in the sale process a prospective client lies.

Segment

A portion of the overall sales market used to target marketing or sales. This is often done by creating vertical sectors.

Tangible

In the sales sense this is a product that has physical traits or a service that can be measured.

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