



An FPC Sales Department Production

# FPC Sales Process Transformation

*An Outside-In Needs Assessment*

*Every business person must ask himself, “How is my customer’s life somehow improved, upgraded, bettered because he uses my product or service? What is my contribution to society beyond that of earning a living?” Earl Nightingale*



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## **FPC Sales Process Transformation**

### *An Outside-In Needs Assessment*

*“It’s our attitude at the beginning of a difficult undertaking which, more than anything else, will determine our success or failure.” Dr. William James*

First Pacific Corporation (FPC) selected me to join the company in April of 2001 in part for my ability to transform the sales and marketing processes of the company. This needs assessment forms the foundation for the transformation of the sales organization at FPC. This assessment is the result of 4 weeks of assessment work that encompasses a 360-degree look at the sales process and the way FPC interfaces with its dental practices. The expected outcome is a professionally trained sales force that can sell a complex operational solution.

#### **Problem/Opportunity Statement**

Define the intervention to effectively and quickly transform the FPC sales organization. Transform the sales organization from a product based 'features and benefits' pitch sales process, into a professional 'consultative sales process' (see appendix 1 for a description of the consultative sale process). The design of the process will help build the reputation of FPC as a company that values the long-term relationships with its dental practice clients and fosters strong field based teams.

#### **Project Focus and Background**

FPC is a solid organization with a very strong history of patient intimacy and profitability. We provide a solution set that helps dentists improve practice performance, profitability, and patient satisfaction. The solution includes funding of production, practice management software and hardware, and an extraordinary level of field support from a service team dedicated to helping the doctors improve their practices. FPC's growth has stayed at a steady 10% pace per year for many years. The owner, Jack Scott, has brought in new management to transform the organization into a world-class organization by improving internal

management and strategic practices. Planning for an ESOP (Employee Stock Ownership Plan) may be in the future if the performance of the organization improves. As the Senior Vice President of Sales and Marketing, I have been given the task of leading the transformation of both the sales and marketing operations of the organization. This needs assessment is focused on only the sales process, however, intervention in this arena will impact marketing and marketing transformation will be included where necessary.

This is a critical project and it is necessary to have effective and fast transformation without putting the whole sales force into shock. The intervention introduced will be the foundation of the future sales process for the organization and will have an impact on the way other parts of the organization interact with each other and the sales team. FPC is a Salem Oregon Corporation and has sales people throughout 23 states. As sales improve, we expect to have an expansion of the sales force both within the areas we now cover and into new areas.

There is diversity in performance on the sales team but on average, each sales person is producing only one sale every other month. These sales are mostly the result of responses to direct mail pieces focused around patient financing. One in ten dentists that respond to the mailings are interested in our services. This is unsatisfactory if FPC is to build a sustainable presence in a very volatile marketplace. FPC is building a new facility and is moving February 2002. The designed facility will accommodate substantial growth. The expected incremental sales volume will improve dramatically with a well-designed intervention and have a substantial impact on the planned growth of the company.

### **Purpose of Project**

The purpose of this project is to quickly assess the current state of affairs in the sales organization at FPC, define the desired result, and design and implement intervention to bridge the gap. FPC expects this needs assessment to establish the foundation for the transformation of the way we interact with our dental practices in the sales process. As an added benefit, it will improve the design of internal process to support the effort of developing delighted and loyal dental practices.

This process will fully integrate into the rest of the organization and we will transform other organizational processes to support the newly implemented sales process.

### **Importance of the Project to the Future of FPC**

The dental practice solutions industry is highly competitive and is in the process of consolidating. Most of the solutions on the market are software only where purchased solutions are installed and the performance of the solution is left to the dental practices. The best designed, positioned, and presented solution sets will survive and thrive in this market. Our position as a solution in the market is that of a high value and innovative niche player. We are a services company focused on helping build high performing dental practices. We do not expect to be the biggest Software Company in the space as software is only a vehicle to help us deliver the services we provide to these dental practices. We do, however, have world-class software and our people, with the extraordinary level of support they provide to dental practices, bring the software to life. This is our strategic advantage.

The way the our dental practices perceive our sales force is a major portion of the value delivered and as deployed now, is not a benefit to the dental practices with but a few exceptions. When we transform the sales process and professionalism of the sale force, FPC will be in an excellent position to have our dental practice's view us as a value leader in this high value market.

### **Research Methodology**

From the initial discussions with FPC executive management and a brief look at the sales process outlines, I had some preconceptions of what the sales people were doing when they interfaced with FPC prospects. I endeavored to be thorough in my assessment to prevent my preconceptions from coloring my analysis. I indeed did have an idea of the methodology for intervention but that changed as I completed my assessment. At the same time, I had a very clear vision of the result

of the designed intervention and the assessment did not change the envisioned result nor did I expect it to.

I decided on a 360-degree assessment process. I gathered data directly from the fifteen sales team members, Kevin my VP of Sales, executive management, the twenty-five field service team members, the owner of the company, and another ten company team members. I also gathered data from about twenty client dental practices, and twenty non-client dental practices. I used interviewing, questioning, observation, listening, postulating, and experiencing of the sales environment as tools for data collection.

### **Current Company Learning Culture**

FPC is an old-line organization that trains to pass on data. Budgets are limited for training and training emphasis is only for new employees. This training is product training only for the most part. The organization is not a learning organization and the process to transform the organization will be a long process. Senior management does not understand that the journey is even necessary as of yet.

Another component of the culture seems to be a lack of accountability. If you combine this with a fear of risk and no sense of urgency and you have a sleepy culture that is patient with under performance and is slow to respond to market changes. This will show up during the assessment phase of this project.

### **Current Sales Process**

The sales team is using a sales process, the foundation of which I have not been fully able to discover. As close as I can explain the process as referenced by one of the FPC senior team members, was a sales event that was institutionalized. The process is not benchmarked against best practices in professional sales.

The way the process is set up is to first send out a direct mail piece with a return card asking a sales person to follow up. The response on the direct mail pieces is under 1% on average. Sales team members do not prospect except for a few exceptions. One person cold calls and a couple others effectively work for

referrals. Once a sales person is forwarded a lead card, he or she will either call or visit the dental practice and ask to set a 10-minute appointment. It is there that the sales person 'pitches' our financing and asks if he or she can collect the data necessary to make a presentation. A 'pitch' is a non-professional approach to a prospect. Think of a used car salesman that try's to get you to buy a car without knowing what you want. I call this prescription without diagnosis. You will not find professionals using this approach. If the sales person is able to go to this next step, he or she will then come back with a presentation about how FPC can improve cash flow, improve production, improve collections, and reduce workload. Although FPC has a complex service solution, the sales person usually simply 'pitches' patient financing to get the sale. After the presentation, the sales person then will try to close the sale. We seem to average one sale out of ten lead cards. This process does not support a complete discovery process as used with the consultative approach to be implemented.

## **Research Steps and Results**

When I joined FPC, the executive team had the foresight to have me work in the field immediately, which provided me with my first assessment steps. I then participated in the FPC field staff training and conference, which was a 7-day gathering for education and communication. This provided me with an excellent forum for questioning, dialogue, listening, observing, and postulating with the sales and service teams, a methodology I used throughout this process. I then designed my final assessment steps to round out the 360-degree assessment. The types of questions I asked in the first two field visits were repeated throughout the assessment steps and will not be redefined after the first two steps.

1. The first day in the field I traveled with one of the sales people to observe the sales process and ask questions about the dental practices, their needs, and their concerns. It should be noted that this sales person was not a stellar sales person as I was warned before I joined him in the field. I observed the sales process, at least as practiced by this sales person, and had an opportunity to ask questions

about the process. Although this person lacked professional skills, he did follow the prescribed sales process to the letter. During this process, I asked:

- Hypothetical questions to explore how the sales person might handle the situation with a different process. Through this questioning, it became clear to me that this individual had a limited tool kit of sales knowledge, skills, and attitudes. Simply stated, he had poor sales skills.
- Devil's advocate questions to explore how entrenched the sales person was with the existing process. This sales person was unable to see beyond the sales process in which he had been indoctrinated. As I asked questions, he could not see how he could easily use the philosophies I recommended. He was unable to think out of the box. This person seemed to lack the personal skills to see growth and improvement. He was willing to try, but that did not overcome his inability.
- Interpretive questions to try to gain insights as to why the sales person felt the results were weak and if indeed he felt the results were weak. This sales person did not view his performance as weak. Through his efforts, he had been able to average one sale every two months. I consider the upside greater than this level of performance. This belief fit with the culture of the company and he was not in the minority in this belief.
- I also observed his interface with the non-client dental practices and the client dental practices and found that he did not seem to be intuitive and missed much of the communication with the people with whom he interfaced. At one point, when a prospect indicated that she would like to talk with him immediately, he ignored her communication and insisted on making an appointment to come back for a 10-minute appointment. When I asked him about this, he said he never did anything but make an appointment when following up on a lead card. This was part of the process as verified later in my assessment. As I design and implement intervention for this company, this rigid training and mindset will be difficult to overcome. It

will be important to consider this during the transformation. This direct interaction provided highly reliable data for the assessment.

2. The second day I traveled with one of the service team members to observe the infield support process, learn the solutions, and ask questions about the dental practices, their needs, and their concerns. This individual is one of the stars on the service team. I observed the support process and had an opportunity to ask questions about the process. During this process, I asked:

- Hypothetical questions to explore how the support person might feel about a consultative process. It became clear that the service team did indeed use a consultative process while supporting the FPC dental practices. This service person felt this would also be the most effective approach for the sales team as well.

- Devil's advocate questions to explore how entrenched the sales people that she worked with were with the existing process. This service person felt that the sales process used and the sales person using the process had dismantled the region built by a consultative sales person in conjunction with the service team. That person left three years ago and the result has been highly detrimental with the new sales person. This acceptance of poor performance is part of the culture and something that I must not perpetuate if team wide performance is to improve.

- Interpretive questions to try to gain insights into what the sales people felt about the results. This service person had seen the productivity of the region decline with no apparent effort from my predecessor to intervene. The consultative sales person that left, as I found out through conversations, was the top performer in the company but unsupported by my predecessor due to the sales persons unwillingness to follow the rigid sales process designed and promoted. This was only further verification of a culture accepting of under performance. This direct interaction with the service team member provided highly useful and valid information for the assessment.

3. The 7 day training and conference for the field team was an excellent opportunity to observe, question, and present new paradigms for professional performance. During the conference, I was able to talk to all of the sales people extensively as well as to many of the service people and explore their views on the state of the organization. During a half day with the sales people, I was able to present a new paradigm and explore their willingness and readiness to move towards a consultative approach to sales. At the same time, I was able to observe the skills of the team and the ideas and knowledge exhibited. My general perception was that the team was bright, enthusiastic, and very eager for leadership. There were only a few sales people for whom I had concerns. I believe that most will be able to move forward assertively to learn new competencies. The most important aspect of these seven days was developing a rapport with the team, letting them get to know me, and then having the opportunity to judge the readiness of the team to embrace a new direction. These seven days provided invaluable data for this assessment and by the end of the 7-day conference, I had formulated an approach to transformation that I am now in the process of implementing. *(Authors Note: The old indoctrination has ended up being an extraordinary hurdle to change looking at where we are at the end of November 2001. The sales force through several leadership changes and product problems, were quite excited about the new direction but severely hampered in their ability to embrace the new direction. We now have the force turned but with four people asked to leave and one having left. We have been successful but it has taken longer than I ever imagined.)*
4. I have had extensive talks with my VP of Sales, Kevin, about the process he has been teaching, its foundation and background, and tested his willingness to move from that position. He is strongly anchored in the old methodology but has shown, through our conversations, a very strong desire to grow and learn. I see him helping lead the change with the proper training and support. As will be discussed in the recommendations, I am grooming Kevin to be the primary change agent helping transform the process in the field. This assessment of Kevin is accurate and valid based on my conversations and observations. *(Authors Note: Kevin has turned out to be an excellent trainer and I am sure that*

*the transformation could not have been done without him. I am very fortunate that I did not underestimate his importance in this process, which allowed me to build the marketing program while supporting his efforts. I learned an important lesson about the impact one person can make on the success of a transformation process!)*

5. I invested one full day personally cold calling in person dental practices in McMinnville to gain personal experience as to the atmosphere and reception in dental practices. I personally visited every dental practice in McMinnville to get a feel for the market. During this exercise, I deliberately did not offer a value proposition for our services or approach the dental practice with a description of our services. I simply told them that I was new to FPC and the dental industry and asked to pick their brains about practice management. The reason I chose this route was that the common knowledge in our sales force was that dental practices would not be receptive to cold calling. As I told the sales team, I would not ask them to do anything that I was either unable to do or unwilling to do myself. Not only did I find most practices open to my approach, we have uncovered a potential client from the process. I also taped my conversations so that I could provide to the whole field team, with all names removed, a transcript of my approach and a discussion of what worked and what did not work. The team is eagerly awaiting the document, which is in the final stages of completion. Building credibility with the team is critical to my success and this is one tool that I used.

I also invested an hour or so cold calling dental practices in Seaside Oregon with one of our service team members. I invested another half day teaching one of our sales team members how to cold call in Bend. The other half of the day I invested meeting and getting to know two long-term dental practices in Redmond. From the experiences cold calling accounts, I discovered a couple of critical insights.

-First, the very fact that a person walks into an office and looks like a sales person puts the personnel in that dental practice on the defense. They expected to have a 'pitch'.

-Second, if one behaves as a professional consultative sales person, that defensive posture relaxes quickly. Not for all practices, but for most.

-Third, some dental practices simply were unfriendly, even to their patients.

My conclusion from this hands-on research was that sales people regularly visit dental practices and most sales people are not viewed as an asset but as an annoyance. If dental practices are approached in a professional manor, reception, as expected, is far more positive. Although my insights are biased, they are based on a very strong and extensive background in professional sales and sales management and are a valid indication of the reception expected in dental practices using a consultative approach.

6. I asked Kevin to survey the sales people to see what professional sales training they had received. The results of the survey are in the appendix. What I found through the survey was that the team experienced very little professional sales training. With but a couple of exceptions, there was none at all for the team members. This survey confirmed my suspicions that my team was poorly trained in fundamentals and they were trying to sell without strong training in their field of choice. I also found that many were self-studying and motivated to learn. Mostly the training they received was from the company and that was training in the sales process that was to be replaced. Little skill training for the most part was evident. This information was enlightening and although not complete, very useful.
7. My final step was to interview the president and owner of the company, Jack Scott. Jack has been with FPC for much of the 40-year history of the company and has owned the company since 1985. I invested 2 hours interviewing Jack about the history of the company, the marketing and sales history of the company, and what he viewed made the company successful. He had excellent insights and was very frustrated that the company lost sight of the service

orientation on which the company's reputation was built. He was also very excited about the future of the company and with the leadership team assembled. When asked about the way dental practices were approached as the company was built, he indicated that a consultative relationship based approach was used. Somewhere along the line this was lost and he felt strongly that it needed to be rebuilt. This was the last step in confirming my supposition that dental practices responded positively to a professional and consultative approach. Jacks insights are invaluable and confirm the suppositions uncovered in this discovery process.

### **Synopses of Findings**

- Dental practices will welcome a consultative service orientation from the sale force.
- The sales team is in need of a strong sales competency tool set.
- The current sales process and the marketing to support it haven't yielded sales increases desired.
- Kevin is enthusiastic about helping transform the sales process in FPC.
- The sales team, for the most part, is willing and able to make the changes necessary to implement a professional sales process with the appropriate training.
- The new sales process will help build the team efforts in the field and improve team interaction and client relations.
- FPC will be able to increase its rate of growth based on a more professional sales process.
- The sales team members need to be change agents. They need to learn the basics of how adults learn and change or they will not be able to help our clients learn and change. The sales training will help here, however I will need to discover more creative ways to build this into their learning.

- FPC reputation will improve in the field of dental practice management.

## Recommendations

*“When we have grasped fundamental principles, we should be able to apply them to any given set of circumstances. If we cannot do this, it means that our grasp of first principles is feeble. It is like geometry, in which we can solve all problems based on a theorem we have mastered.” Gandhi*

My recommendation is that the full sales team including Kevin be trained in fundamental sales knowledge, skills, and attitudes. There is a strong need for the sales team to build efficacy in a professional sales process and fast transformation is necessary but will be difficult. I do not have the time to develop training internally and there is excellent sales fundamentals training available in the market. Based on this need, I have selected Portland based, Personal Growth Associates, to provide the initial sales fundamentals training for the sales team. I selected this intervention for several reasons:

- I have extensive experience with several solution/consultative based sales courses and after careful review, Personal Growth Associates' Soft Selling is the curriculum I chose. I have worked with Jim Lorentzen, the founder and owner of Personal Growth Associates for years and have taken several of his courses. The course he now delivers uses modeling, coaching, affirmations, practice, buddy assignments, contests to reinforce learning, study of tapes, reading, and spaced repetition of material to build efficacy into students. The course has produced students with a high degree of self-direction and on average performance, increases in the form of sales are 100%. Jim interviews every student before allowing the student to participate in the course. Prerequisites include now working in field sales, a strong desire to grow and learn, and strong goals. I also have a high level of trust and rapport with Jim based on the materials he delivers, his dedication to his students, and his integrity.
- I want an intervention built on spaced repetition, extensive practice to build on lessons, as well as peer reinforcement and accountability for performance. During the training process, feedback is offered every week and peer buddies

work together to help each other with the lessons. The course, Soft Sell, is an 8-week course that meets for 2 1/2 hours each week for instruction, sharing, and mentoring. Assignments are then provided each week to practice the knowledge, skills, and attitudes learned in the lesson. Students then reassemble the next week to share results and learn new knowledge, skills, and attitudes that they then can again practice. This version of the course is provided via conference calls so that I can accelerate the speed of intervention. In this way, I do not need to reassemble the team to implement intervention. The first class in which Kevin will participate, is an in person class which is the standard format historically used.

- Soft Sell is one of the very best courses on sales fundamentals I have ever seen. It is based not only on sound solution/consultative sales principles, but also on sound adult education principles.
- Jim personally interviews each individual for up to an hour before he will accept a student into the course. He will not take an unmotivated or ill-prepared individual into the course, as he believes the power of the intervention is diminished and his availability to mentor motivated students is reduced. This interview process will help me identify which sales team members to target to help be peer leaders and kick start the transformation. We will probably need to replace a few team members as well. (*Authors Note: We have removed four sales people from the team and one has left voluntarily based on the need for a professional and motivated sales team. This has indeed made the process of building a successful team very difficult, more so than I had imagined.*)
- I can use my sales training experience and the knowledge, skills, and attitudes learned in my masters degree to help deliver the course and I can use Kevin as a the primary facilitator once he is trained. This will help me insure the team is using the training effectively.
- I am hoping that this process will increase utilization of the materials in the field during training with minimal interruption to our sales efforts. I hope the process will in fact, help incrementally improve our sales effort as each week goes by,

helping improve sales performance and results. One of our greatest fears is that the large redirection in sale process will stall the sales efforts of the sales team. This course complements other consultative training so that I can choose to add other resources to the process as they come available. I would envision bringing in another complimentary course for a full sales team event in the next year or so. *(Authors Note: Due to a variety of factors, sales have faltered. After careful analysis, the complete redesign of our product has been the major contributing factor to this disruption. Sales people are using the new knowledge, skills, and attitudes effectively but have not been trained on the new product. Based on this, a new course is being delivered to all of the sales people at the corporate office in December to retrain them on our current product.)*

- As I add new sales people, it will be easy to provide rapid training for them as I am developing a CCOG to provide training inside the company for new hires.
- We are going to bring this training program in-house and will have the proven materials including tapes, books, and workbooks and the training methodology provided to deliver the training. This will also allow me to have peer mentors participate in the training process
- This is a non-budgeted addition to the sales and marketing budget and costs for implementation will be greatly reduced using this methodology.

### **Expected investment for Intervention**

The full investment for the intervention should not exceed \$7,000 for twelve sales people and Kevin with that investment disbursed over a 6-month period. This will average no more than \$500 per person trained. Expenses such as phone bridge calls are on top of this.

### **Implementation Strategy**

To insure quick and effective transformation, it is necessary to have the effort led in the field by a passionate and well-trained change agent in combination with my efforts. I have chosen Kevin for the role of assisting me in modeling and coaching

in the field. This will have to be the extent of the team until I have some trusted peer leaders that can assist as well. Kevin's training occurs before the other team members and both Jim Lorentzen and I will personally coach him. His training will be a face-to-face facilitated class in Portland starting on June 5 and continuing for another seven weeks. I want Kevin to participate in a face-to-face class so that I can insure that Jim Lorentzen has the opportunity to mentor Kevin directly, helping him quickly transform into a strong change agent. I do not want to leave anything to chance in preparation for him to lead and mentor the field team. He will fly in from Denver each week for the course and continue with his fieldwork from Portland. No other team members will be trained until he is trained and ready to train, lead, and mentor the field team.

During this 8-week period, Jim will interview the rest of the sales people and help Kevin and me determine who will be trained first. We will train in three blocks of four to insure personal attention. Jim will deliver the first class in all three instances and then Kevin and I will deliver the rest of the sessions, with Jim acting as a coach and guest speaker.

Both Kevin and I will be working actively in the field coaching and mentoring the sales team to help them effectively integrate the new knowledge, skills, and attitudes learned in the Soft Selling class.

We will be looking for stars within the sales team to be peer leaders and help in the mentoring process. We will also use these people as field trainers when new sales people are added to the team. The model will be a one-on-one mentor to student relationship.

We will also be looking for other speakers and courses to help provide periodic reinforcement of the concepts. We will bring the full sales team in every year or maybe every six months for product training and sales training. I am a very strong advocate for Wilson Learning and would like to have them provide further training after we have a strong sales increase and can fund an on site training with them. There are other possible courses to look at as well. We may include guest speakers on the twice per month conference call for the sales team to provide

continuous reinforcement of concepts. We will explore other reinforcement ideas to support the successful transformation such as reading, tapes, and activities.

If the service VP is interested, we will develop an abbreviated course to teach to our field service team so that they are fully aligned with the sales process. This may be by conference call or in person depending on the design of the intervention. This team has an extraordinary impact on our ability to keep dental practices and sales skills are important for this team as well.

### **Reflection**

I see my major focus as setting the stage for transformation without telling the sales team that they are doing their work incorrectly. It is certainly the one thing that I have put the most thought into. To do this I have done the following:

1. At the conference, I introduced my philosophies and the concepts on which I base my work. I also provided my mission, my values, and the envisioned results of our work together. I then reinforced these concepts during the conference through my comments, my behavior, and my willingness personally share and risk.
2. When I went out in the field with service and sales team members and modeled the professionalism I envisioned, the word spread rapidly throughout the teams. I have been receiving a steady stream of requests to help team members in the field ever since. The bottom line factor for my success is an increase of sales by my sales team. This is not the only factor for success. Unlike the past where sales growth was the only factor for success, I am also including other factors to the definition of success. These include long term relationships with new clients, the complete understanding of the FPC solution by new clients added to our company, quality of the client/FPC fit, and professionalism in the field. We can track these factors through client surveys, feedback from service team members, percentage lead to sales conversion, and retention figures. Of course, sales increases per person will also be tracked.

3. Kevin and I changed the format on the sales conference call to one of sharing success and ideas rather than the regurgitation of data. This change in format was appreciated and it supports the philosophy of providing the resources and removing the roadblocks so that the team can be successful.
4. Kevin is a critical resource to help in the transformation and I have been working diligently with Kevin to help him move to the new paradigm. He understands where we need to go and has many of the skills necessary already. We are working together to help improve our communication of concepts so that they are used correctly. He will be actively reinforcing the new paradigm helping build confidence in the new direction.
5. Part of the culture that FPC brings forward as indicated in the discussion of culture earlier in this presentation, is one of tolerance of unprofessional behavior. I have helped Kevin identify several sales people that need to find new opportunities outside of FPC based on their unwillingness to consider improvements to their knowledge, skills, and attitudes. Feedback from other team members as well as others in the company indicates a frustration with the tolerance of this behavior. They feel that if they are held to higher standards, so should these team members. If the individuals do not have the willingness or the ableness for change, we need to make a change. We simply are not in a position to carry for a long period people that will not or can not make the transition.
6. When I asked the sales people to provide to me the professional sales training they had experienced, I told them I would do the same for them. I delivered in writing to the team my complete investment in my professional development in sales and marketing as well as general business development. I included professional course work, reading to support professional development, and an indication of the thousands of hours of investment I have made in audiotapes. I also provided a one-page introduction of the value I placed on education and my definition of a professional. In the introduction I also introduced my expectations of the team and my desire to build a world-class team benchmarked against the best practices of the top performing sales teams in the nation. I finished with my philosophy of training and learning to solidify my intent. My motivation was to

provide strong proof that the direction I was taking the team was not based on a whim and a whimsy but based on a solid foundation of knowledge and experience with their best interests in mind.

## Appendix

### Consultative Sales Description

The profession of selling has changed drastically over the last 30 years. The changes are in part a response to the changing attitudes of clients and increased sophistication of clients as well as a large amount of research into the sales process.

For years 'sales' was viewed as something you do to someone. The profession was steeped in manipulation and hard sell tactics as well as an over emphasis on techniques. As the profession evolved, a study of top sales people coupled with a new focus on education has presented a whole new picture of the sales process and the professional in sales.

We have found that 20% of the skills of the sales person are responsible for 80% of the results. The key then is to focus our skills enhancement on the 20% of skills that will contribute to our success most strongly. The skills that must receive the majority of our attention are what I call the front-end skills or relationship building skills communication skills.

One of the interesting discoveries in the evolving picture of the professional in sales is that women tend to have far better front-end skills than men and are making a huge impact on the field of sales.

Empathy, listening skills, the understanding of personality types, and a deep belief in a win/win relationship with the client are the types of skills that are the mark of a professional in the field of sales. This does not mean that a thorough knowledge of your product and your industry are not important; quite the contrary, this knowledge is a very important skill for the professional in sales. However, a sales person with only technique skills and product knowledge will be no match for a professional with strong front-end skills.

The front-end skills combined with product knowledge and an understanding of the industry will provide the professional in sales with the foundation to excel to the top of the field if these skills are packaged correctly.

Packaging is another way of describing the context in which the skills arranged. An easy way to describe context vs. content is to look at a sentence; i.e. the meaning of a group of words vs. the way the words are packaged. This is the same in any field of knowledge as it is in the field of sales. The reason this is important, is that 80% of the knowledge and training on the market will contribute little to your success. Only 20% of that training and knowledge will have a major impact on your success. It is not that the content of the training will differ that much, but the emphasis on different parts of the process and how it is put together will make a large difference.

Larry Wilson, in his book, "Changing the Game. The New Way to Sell" brings this altogether in the context of what he calls "Partnering". We as sales professionals must become a partner with our client, be on their team, always have only their best interest in mind, and build long-term lasting relationships. This is the cornerstone of the professional in sales.

Concentrate on the 20%!! Learn good communication skills, learn how to build relationships, and make a study of personality styles. Communication is a two way process. If you were speaking to someone in English and they only understood German, you might experience a communication breakdown. This may seem obscure, however most conversations in English achieve little more. To study personality styles in greater depth, read Tony Alessandra's book, "Non Manipulative Selling."

We are asking clients to change every day. As sales professionals we are change agents. However, we cannot give away what we do not own. If we cannot change and adapt our clients' communications style and personality, we cannot expect that client to want to work with us. We must sell the way the client is comfortable buying, not the way we are comfortable selling. The client will work

with the sales-professional that is most like the client, is trusted by the client and act like a partner with the client.

Finally, if you do not want to sell on price, if you do not want to be only a bidder, you must sell on value. Basically, the higher the price, the higher the perceived value of your product must be by the client. Your product must be defined to include the actual product, how the product is put together, you as a professional, your company, the customer-oriented attitude, your warranties, and your full team. If you view your product as a mixture or all of these components, you will be able to build value and create relationships and sell on value rather than price.

### **Sales Person Sales Training Responses**

- I went to school for sales, the school of hard knocks. Seriously, I took a course about 2 1/2 years ago taught by a man named TC and his prodigy KB. It was the best education I had regarding sales training. (*Internal company training*) I have also read a book by Tom Hopkins and Zig Zigler. In the local paper I read the Harvey Mackey sales column.
- I am just starting to read anything I can find on selling. Of course in college I took several courses in marketing but that has been a very long time ago and so much has changed. Currently I am reading *Selling for Dummies* (perfect fit) and also *Smart Moves* and *Customer Centered Growth* (building competitive advantage). I also subscribe to an excellent magazine called *Selling Power*. I love it! Have you heard of it? In the past I have been through Tony Robbins Seminars and have listened to about every tape he has made I think.
- I am a big fan of Brian Tracy and have been to his seminar, I also have the following tape sets:
  - The psychology of success
  - The keys to personal power & maximum performance
  - Psychology of achievementIn the early 90's I attended Tom Hopkins', Tony Robbins and Brian Tracy's seminars. I did not care for Hopkins' approach it seemed geared

more for car sales. Tony Robbins was great at visualization. Brian Tracy has more of the relationship/consultative approach that I like.

- I have been through two sales training programs: Professional Selling Skills - I went through this program when I was employed by the Dictaphone Corp in the early 90's. National Training Programs - Sales training provided by a third party Company While with LCI International in the mid 90's. This program was custom tailored to LCI and the telecommunications industry. Both programs focused on basic selling techniques and prospecting. The prospecting was mainly cold calling using a value statement to gain an appointment. For example; My Company has been successful in helping Companies like yours to reduce costs, would it be possible to take 10 minutes of your time to determine if we can help you do the same?
- The following are the training classes I attended: Kroger Management training-1985; The One Minute Manager training seminar-1986 Keebler; District Manager Training-1996; Tapes or books: The one minute manager-paperback; Anthony Robbins-tapes (2-3 do not recall specific titles); Raving Fans, paperback-Customer Service; There were a few more books on customer service but I do not recall titles.
- As far as sales seminars go I have not attended any lately. The books I have read were also a long time ago and I do not remember the names. I did have some tapes but I couldn't find them so I can't tell you what they were called.
- Seminars: Tony Robbins, Brian Tracy, Deepok Chopra. Classes: Catapult basic windows; Catapult advanced "Access". Tapes: Wayne Dyer: ??; Brian Tracy: Excellence; James Van Fleet: Conversation Power, Werner Erhard: Power and Communication
- Here are some books and tapes that I have found useful in selling FPC.
  1. Selling the Invisible By: H.Beckworth This has been one of the best books I've ever read because it talks about selling a "service" and not a "product". The book is easy to read and its format is short stories.

2. The Psychology of Selling By: Brian Tracy This book is available on audiocassette and has many strong closing tactics and real life scenarios. It was a good confidence builder for the sales process.

3. Collect What You Produce By: Cathy Jameson. This was written by a well-known dental consultant and has helped me with resale's and staying in touch with the dental needs of a practice.

4. Adversity Quotient By: Paul Stoltz This book was more of a personal motivator not so much sales. Yet its main focus was how you can turn every obstacle into opportunities.

5. The Successful Practice By: Morton Ehdin Another dental book with many solid practice management ideas useful to both sales and service.

6. Success and the Self-Image By: Zig Ziglar This was an audiotape that focused on self-image, healthy relationships and linking success to the self-image.

- SPIN selling by Neil Rackham. It was very informative and is a selling cycle that is quite interesting. The Wisdom Of Teams by Jon Katzenbach and Douglas K. Smith. Great tape that demonstrates that teams are one of the most important strategies businesses can use to meet the challenge of the future. Dig Your Well Before You're Thirsty by Harvey McKay This book discusses how to build and maintain solid networking relationships.
- In the past I have attended various success-training seminars with motivational type speakers including Zig Ziegler, Fran Tarkinton. Colin Powell, Roger Buther, Tony Robbins, etc. They were pretty good. I can't think of any specific books that I would recommend to our sales staff.
- I have read the book Competing On Value-This book was good it helped me to see the value of our service and how to compete with competitors that do not have value. Even Eagles Need A Push-This book is motivational and helps with self-confidence. Natural Laws Of Successful Time Life Management-This book was very helpful in managing time, setting priorities. Pushing Up People-This book is to develop leadership skills & motivation and inspiration that inspire activity. The Greatest Salesman In The World- Motivational book The Sales Professionals Edge-

A prospecting system in cold calling, the customers needs, selling tools.  
This was a series of tapes called the Beveridge system that came from the home office years ago. It was helpful and fun to listen to.

- Two sales people did not respond to the survey.