RICHARDSON

THE POWER TO SELL

WINNING THE TEAM SALE

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INTRODUCTION

Team selling today is no longer required just for blockbuster business-to-business sales pitches. Whether you are in consulting, investment banking, or technology or are a financial advisor, home remodeler, or lawyer, pivotal meetings with customers and prospects now often involve more people — on both sides of the table. In fact, according to Harvard Business Review, "… the number of people involved in B2B solutions purchases has climbed from an average of 5.4 two years ago to 6.8 today."

Significant technology advances in recent years have enabled customers to gain information about their options faster, and without you. In addition, economic instability, geopolitical concerns, corporate scandals, and public relations blunders have created mistrust and heightened attention to risk and return on investment. Customers now arrive at meetings and calls ready to give all their stakeholders a voice and wanting to look behind the curtain to the people in your organization who will own the work after the sale.

ADAPTING TO A TEAM-BASED SELLING APPROACH

We define team selling as when two or more people from an organization (and its affiliates or co-selling partners) join forces at a customer touchpoint — in-person or virtual — to advance or close an opportunity or to retain a customer.

You're a good salesperson, so why the need to involve others? Well, you're facing more stakeholders, diverse interests, and higher stakes. As skilled and experienced as you are, you realize that this task is impossible to successfully manage alone. So, how can you adapt to this reality?

ACKNOWLEDGE IT: Moving from a solo to a group sales pitch increases the complexity. Appreciating this gets your mindset in the right place to compete for the business.

QUALIFY: Selling alone requires an investment of your time only. That investment (and the complexity) jumps with each person that joins you in pursuing a deal. So, before you begin calling for reinforcements, make sure you've chosen the right client and deal.

UNDERSTAND THE BUYING PROCESS: More decision makers equal more complexity. Each stakeholder has interests, and they may not align with her colleagues'. This increases your task during discovery to understand the players, their interests, how they influence each other, and with whom your competitive strengths and weaknesses lie.

GET UNCOMFORTABLE: Your survival instincts make you want to stick with your tribe, maintaining relationships with people in customer organizations (and your own) that are familiar and receptive. Venturing beyond can feel uncomfortable and even dangerous; however, it's necessary if you're going to be able to understand and influence multiple buyers.

BUILD TO THE TASK: There is no single team that resonates with every client committee. Pre-invest in a wide group of internal relationships, and engage only those who are necessary to address stakeholder interests in the deal at hand.

YOUR ROLE IN BUILDING A WINNING SELLING SQUAD

One of the things that makes team selling feel more complex than solo selling is that it demands more of you as a salesperson, that you play different roles at different times — before, during, and after a customer meeting or pitch. Team-based selling also requires a build process that runs parallel to your sales process. Here are the five stages of building a winning selling squad and your role during each:

STAGE	ROLE
Create	Recruiter
Organize	Organizer
Practice	Director
Execute	Captain
Regroup	Reorganizer

DURING THE STAGE OF:

1. **CREATE,** you must be a Recruiter to attract the right people at the right time to advance or close the sale;
2. **ORGANIZE,** you transform into an Organizer to coordinate your people, your preparation, and your materials;
3. **PRACTICE,** you become a Director to ready your colleagues and partners to hit the mark when it counts;
4. **EXECUTE,** you play the team's Captain, ensuring the game plan is executed as planned and adapted as needed;
5. **REGROUP,** you play the Reorganizer, combining slices from all the roles above to ensure follow-through and to facilitate professional growth for each team member and the unit.

Sound daunting? Leading a team in an effective sales call is straightforward when you approach it methodically. This e-book will show you how playing each of these five roles effectively can help you win more deals when teams are required.

CHAPTER 1

THE RECRUITER

Creating an effective selling squad is the first step on the road to winning a group sales meeting. Building the right team can help you advance an important sales opportunity or retain a key customer. Assembling good people onto the wrong team can be costly — to budgets, to your company's chances to win other opportunities, and to your own reputation.

Putting together great selling teams requires you to play the role of Recruiter. And, as a recruiter for a team pitch or sales meeting, you are faced with three basic questions:

1. **HOW MANY?**
2. **WHOM?**
3. **HOW WILL YOU ASK?**

HOW MANY? For meeting attendees, the easy answer to the first question is: you should bring a comparable number to the customer stakeholders who will be attending your sales meeting. For example, to meet with three decision makers from a buying organization, you might aim for a selling squad of three. Taking too few people risks being unable to address significant areas of interest for the client. Taking too many can cause your client to question individual competency and cost structure.

There is a subtler answer to this important question: limit participants to those who will play a significant role in your sales meeting. What does significant mean? At a minimum, each member should be addressing capabilities or answering questions for 10 minutes or more during the meeting. By setting this threshold, be prepared that your team may be unable to answer every question that may arise, and that you will be leaving qualified and interested people at home. Bottom line: bring the people necessary to address your client's priority issues, advance the sale, and meet your objectives.

WHOM? There are two basic roles on a selling squad: leader and contributor. Let's look at each: **Leader, Contirbutor**

LEADER: Not always the most senior, the leader's role is to take primary ownership of the team's work together — before, during, and after the sales meeting. The ideal leader has customer knowledge and is confident enough to take center stage with colleagues and clients, yet humble enough to yield the floor to others to gain their input during team and customer touchpoints.

CONTRIBUTOR: The contributor supports the leader in accomplishing the team's mission. Examples of contributors to sales meetings or pitches are senior leaders, subject matter experts, and technical experts. The most effective contributors are committed to your mission, willing to invest time in proper preparation, and bring — in addition to their expertise — the ability to give and take feedback that strengthens the team's meeting execution. Some selling squad contributors will attend your sales meeting or pitch. Others will instead support the team in its preparation and follow-up activities.

HOW WILL YOU ASK? Once you are clear on your team's size and who should play what role, it's time to ask. One common misconception is that others will automatically share your interest in closing the deal. This is often not the case, so be prepared to leverage with your colleagues those great persuasion skills you usually reserve for customers. Consider: how will joining you on the sales call or pitch advance their interests?

Bottom line: Creating great selling teams is more art than science. To be an effective recruiter, take the time to think through how many, whom, and how to ask, and you will have taken a solid first step toward conducting a successful team sales pitch or meeting.

2

CHAPTER

THE ORGANIZER

Ever been to a mess of a sales meeting or pitch? Perhaps you have seen the following happen:

- Moments before the start, the salesperson is crawling around under the conference table searching for the dongle to hook up the projector.
- Everyone is present and accounted for, but the pitchbooks are MIA.
- The pitchbooks arrived, but one of your team members didn't.
- Presentation materials include typos and mistakes.

Playing the Organizer role for a selling squad is, in my experience, one of the heavier lifts for most salespeople. It takes project management skills, advance planning, attention to detail, and patience. Did we mention these things are a challenge for many salespeople?

Organizing a selling team engenders confidence among your colleagues, and for customers, it creates the look of a focused and cohesive team at a sales meeting. Being a strong Organizer will also enhance your ability as a Recruiter for future selling team efforts. Not to mention avoiding 11pm runs to the UPS Store the night before a pitch, or embarrassing mistakes during a customer meeting.

So, regardless of how organized you generally are, how can you play the Organizer role successfully for your team? Here are five best practices to help:

SHARE INFORMATION: Great Organizers facilitate information-sharing among team members so that they all have information that is current and that will help them perform their roles at the sales meeting. The areas to focus on are: the client organization, the existing relationship, the opportunity that's on the table, and the customer's attendees.

IDENTIFY COLLECTIVE WORK: One of the reasons you pull together a team of professionals is to produce an outcome that would be impossible to attain on your own. What are those areas where collaboration would produce a stronger outcome? These might include brainstorming the design of your solution and alternatives, meeting objectives, presentation materials, and key themes and differentiators.

PLAN YOUR WORK: Collective work takes coordination. Plan for the following: prep calls or meetings; design, production, and delivery of presentation materials; game-day logistics and responsibilities; and a team debrief following the sales meeting.

MONITOR PROGRESS: A good project manager keeps the project on course in the face of competing demands for team member attention. Think through how best to monitor and communicate progress in completing the group's collective work to team members.

FIND SUPPORT: Being your team's Organizer can feel overwhelming, especially as you move other opportunities through your pipeline, and project management may just not be your thing. Be sure, then, to recruit a contributing member to help you or to play that role.

Bottom line: Organizing your selling team effectively allows you and your colleagues to arrive at a meeting or pitch focused and ready to connect with your customer, and to execute the game plan you designed. It instills client confidence and puts you ahead of disorganized competitors who fumble their way through their pitches. Best of all, being (or recruiting) an effective Organizer puts you on the optimal path to winning and strengthens your ability as a Recruiter for future pitches.

EXAMPLE 3

THE DIRECTOR

Without practice, what are your team's chances of success at a high-stakes sales meeting?

If the stakes are life and death, like they are for the Blue Angels flight demonstration squadron, the question is not whether, but how much you should practice. Flying multiple 22-ton jets at speeds up to 500 mph, and with as little as 36 inches between them — side-by-side or upside-down — the stakes don't get higher. Pilots must have a minimum of 1,250 tactical jet-flight hours. On top of their individual proficiencies, the squadron practices as a unit on roughly 120 training missions prior to its first Blue Angels performance.

A group sales meeting or pitch is neither a show nor a life-or-death moment. Yet, the stakes for a group sales meeting are high enough that you've asked others to contribute to the effort. Your "pilots" all bring individual proficiencies, but how much practice do you generally do as a unit prior to an important customer or prospect meeting?

Practice is about application with the intent to improve. Successful selling squads practice together not because a manager tells them to; effective teams practice as a group because they realize:

- Without it, they have a random chance of winning, and they'd rather stack the odds.
- Feedback is essential to strengthen individual contributions and the team's performance.
- Repetition reduces anxiety for all members when it counts most: at the sales meeting or pitch.
- Talking through who is going to cover what section and what pages, while part of getting organized, fails to cover execution.

Leading a team during practice requires a salesperson to play the role of Director, the equivalent of the Blue Angels' commanding officer. So, what's involved?

COMMITMENT: When recruiting for your team, consider how open each member will be to investing time to practice with the team.

SCHEDULING: Practicing takes a dedicated time and place. A tele- or video-conference is better than nothing. In-person practice beats a call because it better simulates the conditions you will face for an in-person sales meeting.

MORE THAN TALK: Rehearsing requires running through the key parts of your team's pitch, not "Here's where I will talk about our capabilities." What will each person actually say?

FEEDBACK: Creating a feedback loop is essential to strengthening performance when it counts. That feedback can come from you, as the team leader, and by facilitating it among team members. High-performing teams also have access to expert coaching, whether it comes from a manager or an external sales coach.

TRUST: For someone to accept and incorporate feedback from others requires an environment of trust. Suggestions should be shared in the spirit of helping a client, supporting a colleague, and winning.

Bottom line: Practice improves your team's chances of winning the best possible outcome at a sales meeting. The good news is that what you're aiming for is way easier and safer than orchestrating multiple fighter jets at high speeds and tight tolerances. If you want to win against able competitors, you need to skillfully play the team's Director so practice occurs and is managed effectively.

4 CHAPTER

THE CAPTAIN

Oh captain, my captain. This chapter's title may trigger images of a captain's hat, a pipe, turtleneck, and pea coat. Okay, wrong kind of captain. We're talking now about how to captain a selling team in executing an effective sales meeting or pitch.

If you can snap out of the ship captain daydream, we'd like you to consider a different picture. Imagine instead a point guard during a basketball game. She is responsible for handling the ball, running the plays, passing the ball to the player who is in the best place to score, and rescuing the player who is trapped in a corner.

Leading a sales meeting may be less exciting to you than skippering a ship or playing hoops. But being your selling team's captain during a sales meeting or pitch is just as important. Every team needs a leader, a point person to captain the effort. Without one, the team loses its agility. Customer meetings can take all sorts of unexpected twists and turns, including:

- The meeting starts late, and you have less time than expected.
- The client stakeholders who show up are different from those you planned for.
- The interests of the decision makers changed or conflict with those you were told about.
- The technology for your on-screen demo isn't working.
- Members of your team freeze, become defensive, or talk themselves into a corner.

Where's that ship captain when you need him?

Selling squads that are well led are focused and visually connected — to client stakeholders and each other — during a sales meeting or pitch. What actions can you as a salesperson take to successfully play the role of Captain — your team's point guard — during a meeting or pitch?

REALIZE: Your work as a Recruiter, Organizer, and Director before a sales meeting make it easier to be an effective Captain during one.

GATHER: Get together for a pre-game huddle to share last-minute details and review your game plan. That way, you and your selling partners can walk into the meeting feeling and looking like a unified team.

MANAGE: Ensure the customer's priority topics of interest are covered as planned and within timeframes that allow you to accomplish the meeting's objectives.

SCAN: As the meeting develops, monitor client decision makers for cues about both hits and misses. Stay visually connected with your colleagues to course-correct as needed.

OWN: There is a reason that your clients and colleagues committed to this time. Make sure that they and you leave with what you came for. Own the outcome.

Bottom line: Effectively captaining a selling team avoids chaos. When executing a sales meeting or pitch, maybe no one will refer to you as "skipper." As Captain of a selling squad, however, you will drive your team's alignment with the client — and each other — so you gain the commitments you are seeking and advance or win the sale.

CHAPTER 5

THE REORGANIZER

The sales meeting ends. Now what? Fist bumps in the parking lot, of course! You and your team crushed it. Or did you?

During the Regroup stage of the team selling process, you have an opportunity to play yet another role, what we call the Reorganizer. This involves getting your team realigned after the sales meeting and setting the stage for more and even better work together in the future.

See if you recognize any of these common occurrences after a meeting or pitch:

- Your team members scatter to the winds for other commitments.
- You talk it through in the car on the way to the airport or your next appointment.
- You assume your team members are clear on their roles in the follow-through plan.
- You have no opportunity to give or receive feedback about how the team performed.

Reconvening the team following a sales meeting or pitch accomplishes several things: a) it facilitates follow-through on client expectations, reinforcing commitments made during the meeting; b) it creates a feedback loop that allows team members to share with one another how to improve individual and team performance in future sales outings; c) it avoids repetition of the same mistakes and gives the team the chance to replicate high points that were hit; and d) it sets the stage to re-recruit colleagues for future team sales opportunities.

Regroup meetings — a.k.a. debriefs, post-mortems, etc. — are tough to pull off for a variety of reasons: your colleagues are busy — they committed to help you on this meeting, but they're ready to move on to other things; it can feel repetitive and like a waste of time to re-hash the details of what happened in the meeting; and it can feel awkward exchanging feedback with colleagues about individual and group performance.

So, what actions can you take as a salesperson to play the role of Reorganizer effectively?

SCHEDULE: Advance planning (when you're playing the Organizer role) ensures your regroup meeting will happen.

RUN: Make sure your selling squad's regroup meeting checks each of the "TLC" boxes: timely, live (in-person), and collective (everyone is present and focused).

LEAD: Facilitate a conversation that captures each member's observations on what happened, deliverables owed, and individual accountabilities.

SHARE: Create a safe feedback loop, as you did previously as the Director. Enable individual team members to grow professionally and the team to strengthen future performance.

THANK: Your team committed time and energy to this pursuit. Be sure to acknowledge their contributions.

Bottom line: Client follow-through and stronger performance are at stake during the Regroup stage of the team selling process. While often overlooked, the most effective selling squads commit the time — before moving on to other things — to ensure clear accountabilities for follow-up and to exchange feedback so that team members and the team can grow and win again in subsequent sales meetings. Successfully playing the Reorganizer role enables all of this to happen and sets the stage for you to recruit members again for future team sales meetings.

CONCLUSION

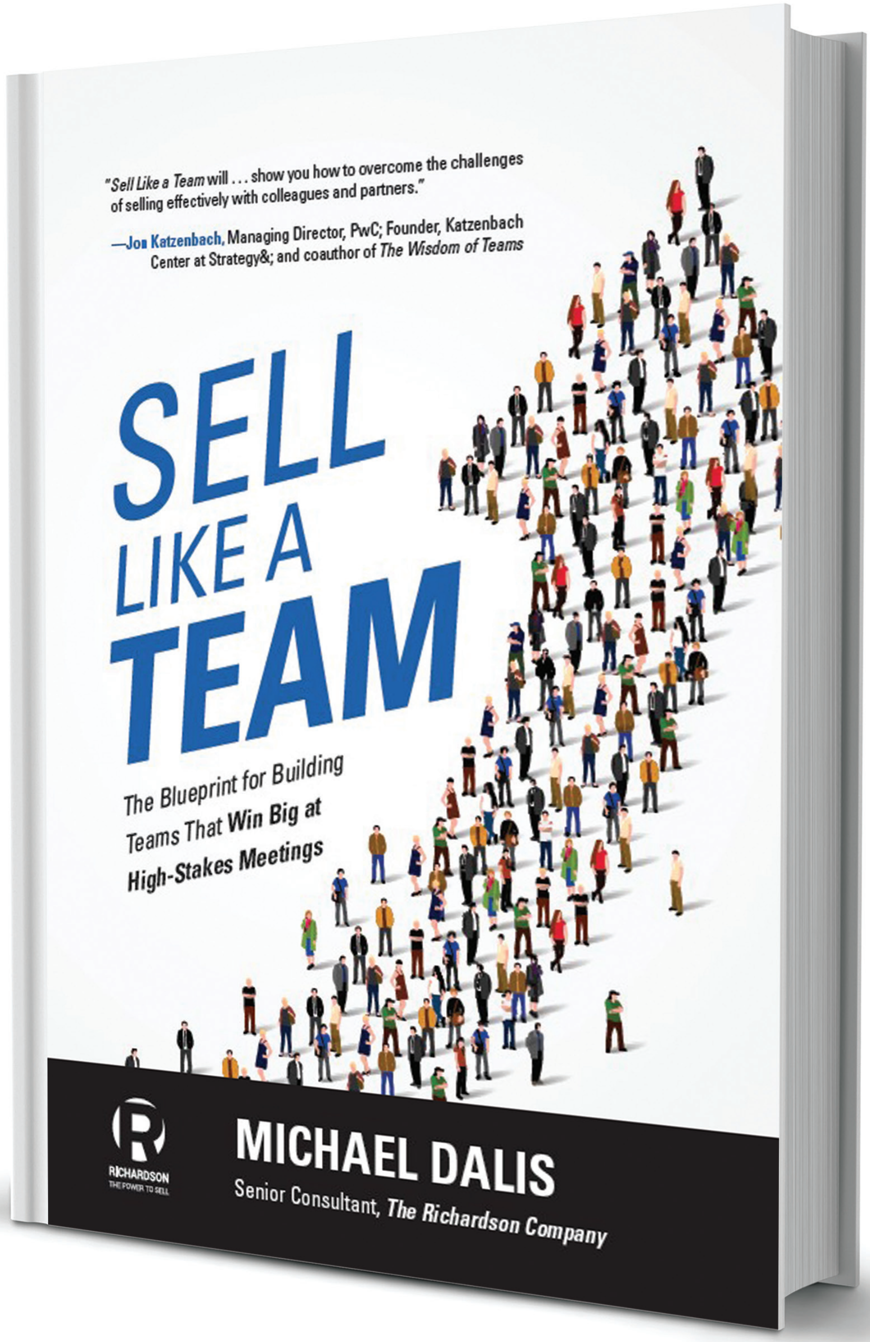
Winning business with today's B2B buyers requires situational awareness, a process for building the right selling squad, and the versatility to play different roles at different times.

Multiple decision makers with varied interests within buying organizations require a team approach to retaining or expanding customer relationships and closing deals with prospects. Recruiting the right team is the foundation. Organizing your team gets you in sync. Directing your selling squad’s practice readies them for execution so that you can Captain your team effectively during the meeting or pitch. Reorganizing your team in your regroup paves the way for excellent follow-through and sharper performance in the future.

Winning the team sale takes a collaborative mindset, project management skills, and a performance focus. Leveraging the tips included here will allow you to gain the versatility you need to play each of the five roles above to drive successful team selling.

CLICK HERE

to learn more about how Richardson’s Team Selling solutions can help your sales organization win more business.



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