

Contents

	List of figures	xii
	Preface	xiv
ONE	Introduction	1
	Objectives of the book	1
	How to use this book	4
	Why do professionals dislike selling?	7
	The context of client relationship management (CRM)	9
	The art and science of selling	11
	Cultural differences	11
	The importance of needs	12
	Why you should have a coherent marketing strategy	13
TWO	Marketing planning	14
	Understanding the basic principles of marketing	14
	So what is selling?	17
	Different levels of marketing planning	20
	A marketing framework	21
	Analysing your present situation (A marketing audit or situational analysis)	21
	Deciding what works for you	25
	Agreeing a strategy	26
	Implementing your plan	42
THREE	What is selling?	46
	Definitions	46
	What makes a good salesperson?	48
	Why is selling different for the professions?	49
	What is a professional?	52
	Consumer versus Business-to-Business sales	53

FOUR	Adopting the buyer’s point of view: An introduction to buyer behaviour and relevant psychology	55
	Introduction	55
	Individuals	56
	Personality	57
	Cultural styles	63
	Emotional intelligence (EQ)	63
	Perception	64
	Motivation	66
	Life cycle	68
	Group dynamics	70
	Buying situations	72
	Organisational buying behaviour	73
	Buying criteria	80
FIVE	Selling frameworks and models	83
	Introducing the sales cycle	83
	Classical models	85
	Consultative or process models	89
	Strategic selling®	92
	Summary	99
SIX	Selling skills	100
	Setting objectives	101
	Targeting	102
	Researching	105
	Cold calling	108
	Networking	112
	Conversational skills	118
	Following up	121
	Building trust	122
	Non-verbal communication	123
	Listening	126
	Questioning	130

Writing skills	131
Presentation skills	133
Persuading – features and benefits	135
Negotiating	138
Handling objections	140
Closing	143
Direct approaches	144
SEVEN Competitive tendering	146
Introduction	146
Common mistakes	148
Elements of a competitive tender	149
The need for a framework	151
Using the framework	152
1 To bid or not to bid?	152
2 Who will manage the bid preparation?	156
3 What do you do at initial client contact meetings?	159
4 What does the client really want?	163
5 What selling strategy should you adopt?	165
6 What price should you quote?	168
7 How will you do the work if you win?	173
8 How do you write the bid document?	175
9 How do you produce and publish the bid document?	179
10 How do you prepare the oral presentation?	181
11 When do you ask for the business?	187
12 What have you learnt?	188
EIGHT Account management	190
Part one – The business rationale	190
Why account management?	193
The objectives of account management	195
How account management fits into day-to-day life	198
Key elements of the account management process	199

Part two – Taking action	202
Establishing the account team	203
Role of the account partner	204
Role of the account manager	205
Qualities and attributes of account partners and managers	206
The first meeting	208
Assessing the client’s satisfaction	209
External service reviews	210
Internal service reviews	211
Client satisfaction surveys	214
Relationship management	215
NINE Firm-wide issues on selling	221
Managing change	221
Culture	223
Business and marketing strategy	224
Involvement of junior staff	224
Time and recognition	225
Role models	226
Feast and famine	227
Ethics and professionalism	228
Loyalty to individuals versus loyalty to the firm	228
Appraisals	229
Research	231
Training	232
Coaching	234
Incentives	235
Systems to support selling	236
Motivation	240
Priorities	241

APPENDICES

1 Sales jargon buster	243
2 Useful sales related books	250
Specifically for the professions	250
Marketing	252
Selling frameworks	253
For experienced sales people	254
Selling skills	254
Account management	255
Negotiation	256
Non verbal communication/Psychology	257
Miscellaneous	258
3 Self-appraisal of service performance	260
4 Internal service review questionnaire and example questions	265
Checklist of open-ended question probes	270
5 Full account management plan	274
6 Summary account management plan	281
7 Checklist: Are you ready to sell?	283

List of figures

1: Why professionals don't like selling	7
2: The business development process in a professional firm	9
3: Building client relationships	10
4: Malcolm McDonald's marketing planning model	45
5: Complex pattern of buying influencers (Chisnall)	57
6: Types of manager (David Merrill)	59
7: Maslow's hierarchy of needs	66
8: The decision-making process	69
9: The decision-making unit	73
10: The interaction model of industrial marketing and purchasing (Hakansson)	77
11: Factors influencing industrial buying behaviour (Webster and Wind)	78
12: Context model for organisation buying behaviour (American Marketing Association)	79
13: Criteria used to assess professional services	81
14: Traditional or 'classical' model of the sales process	85
15: Modified approach to the classical sales process	88
16: Maister's model of business development	90
17: Maister's model	90
18: Managing your clients and contacts and developing a target list	104
19: The 'so what?' test	138
20: Different levels of CRM (Client Relationship Management)	190
21: Linking firm-wide marketing (and branding) to major client teams	191
22: The marketing, selling and client development cycle	193
23: The account management process	197

24: Stages of key account management (KAM)	201
25: Evolution of client relationships (Millman & Wilson, 1994)	215
26: A map of contracts	216
27: Client perception ladder	217
28: Client politics	218
29: The change cycle	222
30: The change cycle force field analysis	222
31: An appraisal form	230
32: The competence curve	233
33: The learning process	234
34: Simple cross-selling matrix – to monitor internal referrals	237
35: Internal processes for the management of external relationships (Gronroos)	241
36: A firm-wide approach to supporting selling activity	242