

I. Introduction

a) Confessions of an Unemployed Sales Guy

“I never heard them before,” I said. My wife was confused. “Heard what?” she said. “The buses. I never heard them before in the morning. Boy, are they loud,” I half-shouted.

“That’s because you’re usually at work by this time. They’re the school buses. You used to leave for work by 7:00 and they don’t start rolling around here till almost 8:00.” My wife always has the answers.

“Well, that’s what I get for being laid off. I’d rather be on my way to work than listening to buses while I’m eating breakfast.” What else could I say? I was laid off. And, as usual, it wasn’t my fault. I was yet again a victim of a corporate down-sizing. This was the fourth time in a career that spanned nearly 3-decades. Each time it had nothing to do with me. I was never fired. It was always due to some down-sizing endeavor that didn’t consider an individual’s skills, experience or loyalty to the company. After four times, I was actually getting pretty good at it. But what can you do? Of course you go through the usual five stages of a shock like this:

1. Denial (*“What? This can’t be happening to me! There must be some mistake.”*)
2. Bargaining (*“What if I tell them I’ll take a lesser paying job? Then they can still keep me.”*)
3. Anger (*“Those SOB’s. They can’t do this to me. I’ll show them. I’m calling my lawyer.”*)
4. Depression (*“I can’t believe this happened to me. I am such a loser.”*)

5. Acceptance (*“That’s okay. At least now I can do something I really enjoy. This is a blessing in disguise.”*)

After that, you better get off your butt and do something with your life. Some of us find another job in the same field (the most common route). Others change careers. Me? I decided to finally work for myself after my latest, untimely departure from corporate life.

b) Wherever the Wind May Blow

I decided to be a consultant. No, not the kind that’s in it until he finds a “real” job. I mean a real-life, full-time, dedicated consultant. After many years as a sales professional and sales manager in the high-tech industry, and being in the Customer Relationship Management (CRM) arena for nearly a decade working for CRM vendors, I had a lot to offer customers looking for my expertise. My goal was to be a consultant author, speaker and trainer. That’s a tall order for someone just starting out on their own. But, as Zig Zigler said, *“It’s not your aptitude but your attitude that will determine your altitude.”* And boy do I have a great attitude. However, when you’re starting out on an adventure such as this, you can easily get side-tracked, misdirected, and otherwise completely blown in all sorts of directions -- wherever the wind may blow.

To make matters more challenging for me, at this particular point in my life when I got down-sized, the timing couldn’t have been worse. Although there’s never really a good time to get laid off, there certainly are worse times and this was definitely one of them. A few months prior to my ill-fated news while I was still gainfully employed, my wife and I signed a contract to have a new house built in a beautiful Las Vegas

suburb. We sold our house in New Jersey in one day and rented it back for a few months until our new house was ready. So we were already committed in every way, shape and form to moving when the news about the down-sizing came. Without a job, this bordered on insanity. Yet I had no choice. Our old house was sold and we certainly couldn't make the buyers return it. Also, we had a non-refundable down payment on our new home with large amounts of upgrades that we wouldn't get back if we changed our minds. So we were committed to the move.

And if that weren't enough, this was right after the 9/11 horrors and nobody wanted to buy anything, spend money, or trust anyone. The economy stunk. Then along came Enron, and the entourage of corporate crooks that drove the economy deeper into the abyss. Throw in the dot.com fiasco and we were batting a thousand at this point. Finally, I quickly learned that Las Vegas was not only still a "cowboy town", but that also meant it had a strong "good old boy" mentality and you really had to be networked to get anywhere. I don't mean in the political, grease-the-palm sort of way. I just mean that since this town was growing so rapidly and where there were so many transients, many businesses didn't stick around very long. The older, more established businesses don't trust you unless you've already developed a reputation and stability in the form of longevity (at least two to three successful years in business in this town) and a satisfied customer base.

Once again, time was not on my side. I needed time to get myself established and build my network and reputation in this new town (not to mention throughout the country, since that was my true market place). Adding to my challenge was the fact that about 85 percent of the businesses in Las Vegas had less than 25

employees. Right, not the big metropolis one can take advantage of in the consulting world. Oh yes, there was one more fly in the ointment of bad timing. Our daughter was getting married.

c) The Success Factors

There's a saying I always liked that goes something like this, "*Both the man who says he can and the man who says he can't will succeed.*" It was just a matter of me deciding whether I can or can't. Clearly I decided I can. But I needed to focus, be driven, and be organized. I focused on my direction, what I wanted to be and how I needed to get there. I was relentlessly driven to my goals and never stopped my pursuit. I used two critical ingredients to help me get and remain organized – a Sales Process and CRM Technology.

The sales process I chose was the same process I used successfully for many years during my career in sales and sales management. The process was simply the organized steps a sales person takes to successfully move a prospect through the buying process. I used CRM technology to help me manage the process. They're a perfect fit, yet many sales people use only one or the other, and sometimes regrettably neither.

These two vital ingredients have been known to help individual sales people as well as entire sales teams and organizations. I know since I used and taught them in both large and small environments very successfully. The advantage to a sales organization is that the sales process, once refined into best-practices, combined with CRM technology will help each and every sales person in that organization perform on a more level playing field which helps both the individual sales person and their company to succeed. For the individual sales professional,

it keeps him organized and focused on the goals and tasks he needs to accomplish. A sales process and CRM technology have unquestionably helped me in my career as a sales professional and sales manager. However, there is no doubt in my mind that they have especially helped me become a very successful individual consultant, speaker, author, trainer and now radio show host.

Consider a small client of mine named Mike who is also self-employed. I met Mike at an event one day and we became friendly. He knew what I did as a Sales & CRM consultant and also that I specialized in CRM technology. One day he called me. When I answered the phone, all I heard was, “*I fired her!*” “*You what?*” I said. “*I fired her!*” It was Mike. He was very upset. “*You fired whom?*” I inquired.

“*My assistant! This is the second one in six months,*” Mike said in disgust. “*I just can’t seem to find someone who is smart, reliable, trustworthy and easy to work with.*”

“*Are you sure you really need an assistant? Are you growing?*” I asked.

“*No. I just need someone to help me get out from under. I need someone to organize my customer database so I know who to stay in touch with and when. I need to send them letters and emails all the time and stay in touch with them. I end up not doing any of these things because it takes me too much time, and time is not something I have a lot of. I even used to mail out surveys to my customers to learn what I need to improve upon in order to service them better. But since my customer base is growing, I don’t have time to do that anymore either. It took me days to print and mail them out manually, and that’s when I had*

only a small customer base. Now, forget about it. Russ, unless I get some help, I not only will never grow, but I'm actually going to start losing customers."

Mike's problem is not unique. He represents a large percentage of small businessmen, entrepreneurs and individual sales professionals who are overwhelmed with work. I even know quite a few larger companies who suffer from the same or similar problems. Mike's a financial consultant who spun-off into his own business about 18 months earlier and quickly found himself inundated with work. As soon as he got himself several dozen clients, he started having a hard time keeping up with managing his relationships, marketing for new business, scheduling activities, organizing his life, and keeping up with his administrative duties. These are the same challenges faced by a majority of sale professionals. What was he to do?

Our conversation continued. *"So what is it that I can do for you, Mike?"* He said, *"Russ, you're a business consultant. What do your other clients do? You know, I bought this contact manager when I started over a year ago and I barely know how to enter something into the calendar. Do you think that if I learn to use this thing the right way, I won't need an assistant?"* It turned out that Mike had purchased a copy of GoldMine[®] and barely knew how to log into it.

"I can't say you won't need an assistant, Mike," I said. *"But I can say that if you learn to use GoldMine the right way, and I mean take the time to really learn and use it, and you have an organized process of how you acquire new customers and retain existing customers, you will be a lot more productive and waste a lot less time by getting technology to help you perform your job. I can assure you that it will help run parts of your business*

and save you a considerable amount of time. That is what many of my large and small clients do.” So Mike invested the time and the money and brought me in to help define some of his sales processes, train him on how to use his CRM system and configure it to operate the way his business and processes ran.

Within two weeks of my visit Mike was in love. He was using the calendar to manage his entire schedule and follow up with his clients. He learnt the best ways to enter and manage his prospects and customers through the CRM system. He was segmenting his data to identify his best and worst customers based on the data he collected about each one of them. In addition to that, he was efficiently sending emails and letters to selected contacts. In fact, within the first month of my visit, Mike sent out one of his surveys to every one of his key customers, and it took him less than an hour to print personalized letters, surveys and envelopes. He was ecstatic.

One day Mike called me and said, *“Russ, I’m doing so well with this and am so productive that I decided to wait a year before I hire an assistant. I actually don’t need one now since GoldMine is my assistant. I might as well save the \$35,000 and put it into my business so that it can grow. Then, in maybe a year, I’ll move into a larger office and hire an assistant to handle the growth, and maybe even hire a sales associate to help me get more new business. I really can’t believe how much more I’m getting done since you helped me.”* “Well Mike,” I said, *“I hate to say I told you so, but...”*

At the time I was writing this book, Mike had moved into a larger office space and had hired an assistant. His business was thriving and his life was sane. This was only eight months after my visit with him. Mike’s problem is very common and the

solution is not only real, but practical as well. The goal of this book is to help the individual sales professional, small business person, and even a sales team to become more proficient with selling by using CRM technology to augment their selling activities. It also explains how to develop and use a sales process and teaches the selling skills needed in today's tough sales environment.

Mike's situation is a good example of the power of productivity that results from having processes and using the right tool properly. Just imagine how much more effective and efficient you'll become as a sales professional or sales manager, when you enhance your selling skills while deploying a CRM tool to assist you with the steps in your sales process. Having just technology is not enough since you could be automating bad practices and exacerbating poor habits. Having only a sales process is helpful, but given how much needs to be done to juggle all the balls for acquiring new and retaining existing customers, without automation a sales person can easily become overwhelmed and drop the balls. Successful selling has to do with the combination of three key components: a Sales Process, Selling Skills and CRM Technology (Figure I-1).

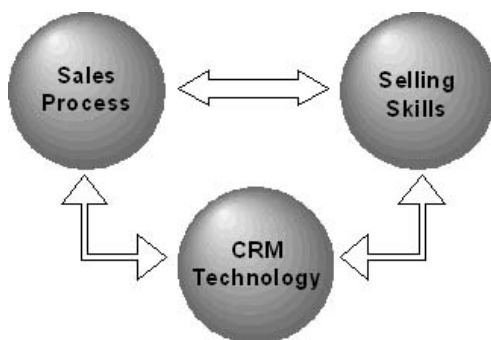


Figure I-1 – The Three Ingredients for Successful Selling

It's when these three ingredients are combined that you will have the highest probability of success.

In this book I will be using GoldMine for illustrative purposes as the CRM technology of choice. The cost per functionality, its growth capacity, its ease-of-use, and its ability to be configured around your needs are unsurpassed. Nevertheless, other quality CRM products will work as well. I'm not expecting every reader of this book to be able to apply the techniques I discuss to their GoldMine system, assuming that's what you are using. The same comment applies to whatever CRM technology you decide to use.

Many of these features require some amount of customization or configuring, which you may not be interested in doing, or might not have the time, knowledge or wherewithal to do by yourself. What you *can* do is engage an experienced GoldMine reseller or consultant who can apply these changes for you and train you in the more intricate functionalities of GoldMine. Trust me, the resulting productivity and efficiency that you will achieve is well worth the investment.

I will also be using the Peak Sales Process™ as the sales process of choice. There are many sales processes available. You might already be using one yourself that you like. Or, you may be using a sales process and aren't even aware of it. Some sales processes can get very complex. For sophisticated and long sales cycles, these may be necessary. However, I have found over the years, after managing many sales organizations and individuals, that the simpler the process, the better it is.

That's why I developed the Peak Sales Process. It is a simple and straight forward process that helps the sales professional

perform the right activities at the right time in the sales cycle. No more trying to close too soon when you don't know yet what the customer needs. No more product pitches for a solution the prospect doesn't require. Just a simple, step-by-step order of activities designed to move the prospect through your sales cycle -- quickly, efficiently and successfully. This, combined with a CRM product to help organize, automate, and manage these steps, is a combination that no sales professional can do without.

Let's begin by defining Customer Relationship Management and learn why it's important for your customers and how to develop your CRM strategy. After that, we'll discuss the Peak Sales Process, what are the steps involved, and how it can make you more successful in your sales career. The Peak Sales Process will be discussed in detail intermixed with how to use a CRM tool, GoldMine, to implement the steps involved in the process while helping augment your selling skills.

Selling has clearly changed in this new millennium. Your sales techniques and skills need to change as well. By combining a CRM strategy in your individual or corporate business with an effective sales process, good sales training, and quality CRM technology, your success is more assured in these challenging times.