

WILL BARRON

SELLING MADE SIMPLE



FIND AND CLOSE
MORE SALES USING PROVEN
STEP-BY-STEP FRAMEWORKS.





**Selling
Made
Simple**

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Selling Made Simple - Version 1.1

Why You Should Read This Book

**You'll love
Selling Made Simple if -**

- Feel overwhelmed.
- Have no sales process.
- Lack of motivation.
- Want to make more money in your sales role than ever before.

***Selling Made Simple* will help you successfully -**

- Understand your market.
- Get in front of buyers.
- Explain the value and close the sale.

What this means for your sales career -

- Make sales success predictable.
- Make more money than ever before.

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Introduction

Welcome to Selling Made Simple. This book is the result of 8 years of research, 1,000 interviews on the Salesman.com Podcast, 14,000 completed SalesCode assessments and 2,000 students inside Salesman.com Academy.

Selling Made Simple covers everything you need to know to find and close more sales. The content follows the same structure as the Sellers Journey. Start at the beginning of the book and implement the training as you go through each chapter to get quick results.

The Selling Made Simple process can be directly mapped against the modern business-to-business Buyers Journey too.

The Selling Made Simple system is the most effective, straightforward sales process that actually works in the real world. Why? Because each element of it consists of step-by-step frameworks, measurable results and leverage of the scientific method to find success rather than stumble into it.

I hope you enjoy making selling simple.

Buyers Journey

Understand Their Issue

No Awareness

Awareness of Issue

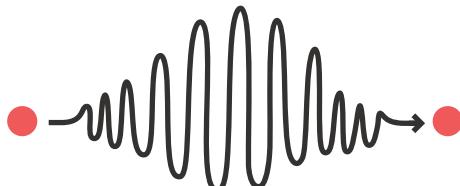
Look for Answers

Explore Solutions

Compare Vendors

Purchasing Decisions

Purchasing Decisions



Traditional Sales Process



Selling Made Simple

How It Works

Traditional sales training is a mess. There are a thousand different ways of doing things, created by a bunch of people who haven't sold anything in the past 20 years.

Over-complicated methodologies, meaningless formulas, confusing templates—they're everywhere these days.

Why?

Because the entire multi billion-dollar industry was built on getting people hooked and then never delivering results. That way, sales professionals like you keep spending

money with them again and again.

It's complicated out there.

But we do things differently. We make selling simple.

Our selling frameworks are proven, step-by-step instructions to complete a specific selling activity. When you leverage our frameworks, your results become predictable. You get a straight forward process to follow, so you know exactly what to do next.

The result is less stress, more consistency, and a heck of a lot more wins.

Over 2,000 salespeople use our frameworks to level up their sales careers through our Salesman.com Academy program. We know they work. And all you have to do to get the same results is leverage the frameworks that we're sharing in this book.

Before we get into the Selling Made Simple process, there is one thing that you need to know about working in sales...

The First Rule of Sales

The first and most important rule of sales is that it is a game. If you frame everything in this book as a game rather than a “job” you’ll dominate the competition.

But what is a game?

Games have 3 elements -

- **Feedback loops** - Grab 100 rings in Sonic the Hedgehog and you’ll get an extra life. Fall down the hole in Super Mario and you’ll lose one.
- **Variable outcomes** - Some things will work to defeat the end level boss. Others won’t. You need to experiment to find the correct solution.
- **Control** - Your hands input your direction with a controller or the movement of your piece on the chessboard.

Games that don’t have these elements aren’t fun to play.

The best, longest term, most entertaining games all have these elements. Sales does too -

- **Feedback loops** - Get rejected on a cold call? That’s immediate feedback that your strategy wasn’t quite right.
- **Variable outcomes** - Some deals are large, others small. Some sales come in easy as you’re in the right place at the right time, others take years to materialize.
- **Control** - You are in control of your sales activities. Both in the quantity of output and the quality of their effectiveness.

To have success in the game of sales you need to understand two things -

1. The cost of failure is essentially zero - Nobody is going to die if you make a mistake playing the game of sales. No prospect has ever murdered a salesperson because they didn’t like their value proposition (probably...)
2. You’re competing with others by typing letters on a keyboard and saying words in the right order. If you do it well enough you get to buy a big house.

So to win big in sales, you have to play the game and have frameworks in place to get past obstacles. That’s literally it.

Meet the Crew

To emphasize the idea of sales being a game we use characters to illustrate the frameworks and training in the book. Let's meet the crew -



SAM

An average sales professional with aspirations to become great.



WALTER

Successful seller who mentors Sam. Nobody seems to notice that he's a dog.



HARRY

Sam's best customer. He's a little daft but he has problems that need solving.



BRIAN

Bumbling sales manager who hasn't actually sold anything in 10+ years.



CHRISTOPHER

High flying company CEO goes out of his way to help the team.



MARY

Head of marketing at the company. Good intentioned but has never sold anything.



GERALD

Unsuccessful outsourced sales trainer that Brian insists the team work with.

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So much of what we do in management, in sales, in life, **is making things more complicated than they need to be.”**

Greg McKeown, Best-Selling Author,
Salesman.com Podcast.

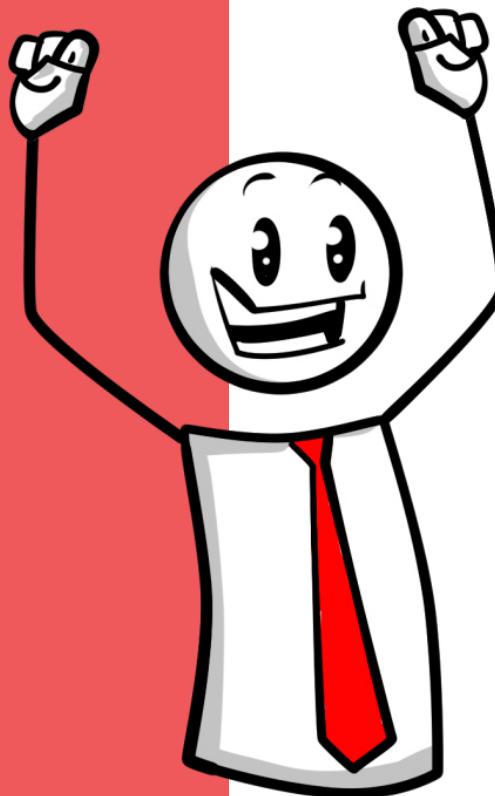
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Understand the Market

01.

Selling by the Numbers



Selling by the Numbers

If you don't know where you're going, it's hard to get there.

The same thing happens if you don't understand your sales numbers. If you knew the exact sales activity you needed to do each day to smash quota; you'd be more likely to do it.

Sam was never sure how much work he had to do each day to beat his quota. Some days he'd feel motivated and do lots of selling activity. On other days he'd feel tired and would do less.

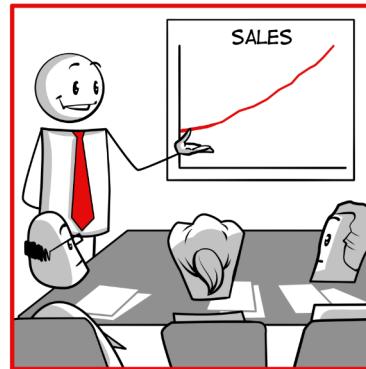


He lived a cycle of booms and busts. This naturally, this led to lots of stress throughout the year, even though he always end up hitting quota.

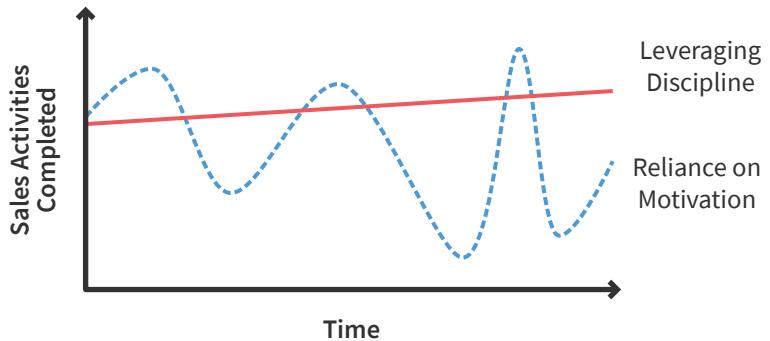


Walter suggested that Sam calculate the activity needed to close a single sale and then scale this over the next 12 months of sales quota. Sam completed the assignment and put in the work each day. As a result, he got better outcomes and reduced his stress levels.

Sam now loves breaking down his sales quota into daily sales activities and ticking them off one by one.



This chapter explains how to create your version of your sales quota that will intrinsically motivate you, then break it down into a one page, daily action plan.



“What’s My Motivation?”

Clichéd as it is, this question still resonates today. And not just with actors. But with retail workers, executives, laborers—with everyone.

For sellers, keeping up their sales motivation day after day is often a struggle. Boredom, anxiety, hopelessness, and downright depression can all be common in the face of

a too-far-off sales goal. And for some, the harder they seem to work, the less they seem to earn.

If this sounds all too familiar, don’t worry: **You’re not alone.**

Luckily, there’s a way out. It just takes a bit of strategic work on your part.

This chapter shows you how to overcome a lack of sales motivation using a proven 5-step framework. And with it, you can boost your numbers, blow past your goals, and achieve more sales success.

The Secret to Sales Motivation

Sales motivation is a tricky beast.

On the one hand, it can inspire you to take on new challenges. It can give you the energy you need to truly test your limits. And it can be the impetus to winning record-level sales.

But there's a dark side to motivation, too. If you rely solely on motivation to get things done, you're setting yourself up for failure.

For example, on high motivation days, you may feel bulletproof. You're packing your pipeline full of prospects, piquing the interest of leads, and closing deals like a boss. But on the bad days, you're erasing all of that

progress. You're missing out on closing opportunities, forgetting to follow up, and letting ideal buyers slip through your fingers again and again.

So, how do you keep the sales motivation going? How can you wake up energized, enthusiastic, and eager to achieve each and every day?

You can't.

Surprised? Don't be.

We are all human. We are all prone to having good days and bad ones. And anyone who tells you otherwise is selling you snake oil.

Instead, you need **discipline**.

You don't need a motivational magic pill (it doesn't exist). You need a system that takes motivation out of the equation entirely. And you need a way to succeed *day in and day out*—on the good days and the bad.

And that's where the Selling by the Numbers Framework comes in.

“

That doesn't mean you have to have a million-dollar goal, but you have to figure out what's important to you and you have to figure out a way to drive towards that every day. **Otherwise, you will end up lacking purpose and lacking drive and lacking motivation and then you're just going to be unhappy.”**

Jarrod Glandt, President at Cardone Enterprises,
Salesman.com Podcast.

The Selling by the Numbers Framework

Don't be fooled here—*this is not a one-size-fits-all approach*. Rather, the Selling By the Numbers Framework is a way of reverse-engineering your goals so you can better understand the steps you need to take to achieve them.

How It Boosts Discipline

The best thing about the Selling By the Numbers Framework is it actually helps *boost* your sales discipline when followed correctly.

Here's how.

Eliminate the Roller Coaster of Sales

Most salespeople live on a roller coaster of ups and downs. They get some traction, close a few deals and are loving life. Unfortunately during this period of closing they forget to continue prospecting and so the next few months go to shit.

By the end of this framework you will create a daily sales activity plan. As long as you continue to implement your daily activities you'll eliminate the roller coaster effect that causes so much stress and pressure from sales management.

A Single Path to Success

A major factor in feeling unmotivated in a sales is not knowing whether the steps you're taking actually lead towards a win.

Maybe right now you're "winging it"—you're reaching out to prospects when it *feels* right, switching up your cadences on a day-by-day basis, and trying out different approaches when you read about them.

While there's definitely value in experimentation, this haphazard approach stops you from determining what's working and what isn't. And as a result, you're left wondering what you did wrong when you miss your quota.

The Selling By the Numbers Framework gives you clear, weekly (and even daily) goals so you quickly know when you're winning and when you're failing.

And that clarity will keep you pushing forward.

Easy to Communicate

The framework is also simple to understand and break down for others.

But how does that keep you disciplined?

On the one hand, the simplicity makes it a snap to keep management on-board. A clear and quantitative end goal, regular way-points to track progress, a focused road map that you can refer to daily—it's a dream for the higher-ups. And the more your supervisors get behind a plan, the easier it is for you to stay on track.

Beyond that, the framework's simplicity also makes it great for teaching to the rest of your sales team. With more hands on deck, you can continually refine the process to make it even more effective.

Forces You to Decide What You Want

This one's important.

Money isn't everything. It's a big deal, sure. And having a *lot* of it is certainly a reasonable goal. But feeling satisfied in sales doesn't always have to be about reeling in a massive paycheck.

This framework forces you to decide what's really important to you. Are you looking for a way to finance a new home purchase? Do you want to demonstrate consistency and reliability to help accelerate your career? Are trying to retire early?

By setting precise targets and following the plan each day, you can rest assured you're continually working towards the goals that actually matter.

HINT:

Almost everyone complains about running through this process when they join Salesman.com Academy. It takes time. You're not in front of prospects. It seems like you're going backwards.

However, everyone comes out of the other side of the numbers process wondering why they didn't do this years earlier.

Get it done and I promise it'll will:

- Reduce your stress levels as each month you know that you can put X buyers into your prospecting machine to get Y meetings out of the other end.
- Improve your overall consistency as you won't reinvent the sales process each morning. Instead, you can ease into the day by following your checklist of most important activities.
- Level up your relationship with your sales manager because you'll be able to forecast your activity forward accurately which will get them off your back.

The Downside of NOT Selling by the Numbers

Beyond those benefits, there are also plenty of downsides to *not* selling by the numbers. Here are a few of the biggest:

You Don't Know What Works

When you don't follow a clearly defined process, you're working from instinct rather than data.

Sure, there are some salespeople that get lucky. Maybe they catch a windfall client out of nowhere. And maybe they succeed against all odds using a slapdash approach.

But without a step-by-step plan, you can't collect the data to see what's working and what isn't. That means you can't refine your process. You can't replicate great results. And you can't know for certain you're on the path to success or not.

Relying on the Unreliable

To people outside of our profession, sales is all about charisma. It's about charm, magnetism, and talking your way into a sale.

But you know the gift of gab can only get you so far.

A master charmer can certainly seduce *some* buyers into eating into their budget. But more often than not (and especially in the B2B space), a seller that relies entirely on their charisma is a salesman that doesn't consistently hit their numbers. Beyond that, a "charm first" approach to sales can actually *scare off* some buyers.

With the Selling By the Numbers Framework, you're consistently putting in the work each day. You can rely on the process to generate results, rather than intangible elements like charm.

Stuck in the "Work Harder" Trap

Finally, the framework lets you break free from the "work harder" trap.

Researching and trying new sales approaches every week is *hard*.

Guessing at what went right (and what made you fail) is *hard*.

Working overtime again and again to make your number is *hard*.

Convincing your manager that next month will be different is *hard*.

This framework gives you a simpler, clearer path to consistent success. No guesswork. And no more working *harder*, just smarter.

The Selling by the Numbers Framework

The framework starts from the end and moves *backward* to define how to reach your goals. It does so in just five steps:



DEFINE YOUR
WANTS

+



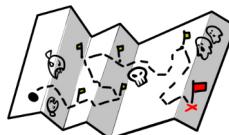
SET YOUR
INCOME GOAL

+



DETERMINE YOUR
INCOME
STARTING POINT

+



ESTABLISH
YOUR
WAYPOINTS

+



CREATE YOUR
ONE-PAGE PLAN

“

No solution is perfect. No software is perfect. And if you have people out there trying to convince the customer that your product is perfect, **every company is going to see right through that.”**



Peter Von Burchard, VP of Sales & Customer Success at Wistia, Salesman.com Podcast.



01. Define Your Wants

Part of what makes this framework so effective is the fact that you're beginning with the end in mind—what you want to achieve—and reverse engineering those results.

So let's start there. What do you want?

Don't be fooled—the simplicity of the question is deceptive.

“More money” for example, is a goal. But it's not an *end* goal because it doesn't get to the WHY of it all. Do you want more money to fund your kid's college program? Do you want more money so you can be in a similar

income range as your social circle? Is it all about getting that shiny new Range Rover? There are two important things to remember here:

- **Dig Deep** – Understand what's truly important to you. What do you want to achieve this year? What do you want to buy, to be, to do, or to have?
- **Make It Concrete** – The only way this framework will be effective is if you can work back from a solid, non-abstract goal. Your goal must be measurable.

HINT:

Leave the Money Out of It

At this stage of the framework, just focus on end-goal wants, not the money it'll take to buy them.

You might think that you want to earn an extra \$100k this year... but you don't really. What you want is what that extra \$100K a year can purchase—a new house, a future for your children, a safety net so that you can feel secure.

Don't worry. We'll get into the financial step of the process in the next step.

For now, just stick to brainstorming how you want your life to look like in 5, 10, 20 years. And then we can work backwards from there.



02. Set Your Income Goal

Next, it's time to set your yearly income goal.

Working backward from what you defined in the previous step, determine how much income you'll need to make, in order to achieve that goal.

If it's a tangible item that you're after (like a car), then this step is pretty easy. Find out how much extra income you'll need to comfortably afford it and tack it onto your current income.

For wants that won't be fulfilled right away (like saving for your child's college), determine how much you'd like to save per

year to achieve it. For example, if you want to send your child to an Ivy League school, you can expect to pay about \$225,000 in tuition. Over the course of 5 years, you'd have to save an additional \$45,000 per year.

If your want is to be offered a promotion, you'll have to do a bit more thinking. Maybe becoming lead sales rep for 3 years running is the ticket to getting noticed at work. In that case, the goal is to bring in more sales than other reps on your team. So working backward from that want, how much do you have to earn to eclipse your team mates? *That's* your new income goal.

HINT:

Expect the Unexpected

When setting your income goal, it's better to aim *high* than it is to be conservative.

For instance, if you're saving up for your child's college tuition, be sure to give yourself plenty of wiggle room. So say tuition is around \$225,000 and over 5 years of saving, that means earning an additional \$5,000 per year.

BUT that's not accounting for all the unexpected problems along the way. Problems like:

- Tuition increases.
- Higher tax rates.
- Inflation.
- Family emergencies that cut into your savings.
- Home relocation costs.

The longer out your goal is, the more likely it is that *something* will throw your savings goals for a loop. So rather than deal with those problems later, build padding into your income goals *now*.



03. Determine Your Starting Point

The next step is to take stock of where you're starting from.

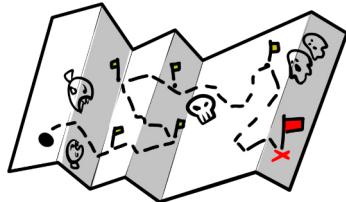
Doing this is simple—what is the gap between your likely reoccurring revenue or bulletproof inbound leads that close quickly and your income goal?

Don't over-complicate this step. Take what you've earned already or are very likely to bring in and subtract it from the final goal.

Take into account:

- Do you have solid customers that are going to be a consistent source of recurring revenue?
- Are you midway through a sure-thing deal and are just waiting to collect your commission?
- Are you going to be *losing* a longtime customer?

Think about what is already scheduled for this year that will impact your income and build that into the difference you calculated.



04. Establish Your Waypoints

Now it's time to build out the quarterly, monthly, weekly, and even daily waypoints you need to hit to earn your income goal and achieve your wants.

Try to make these waypoints specific using data from your customer relationship management (CRM) tool. Look at historical numbers to find out your average deal size and break down your numbers according to that.

For instance, say you want to hit a yearly sales target of \$1,500,000. With that target in

mind, you'd then work your way *backward*.

If the average dollar value of a deal is \$100,000, you'd need to close 15 deals a year. That would mean sending out 30 proposals. And completing 60 demos. And so on and so on.

In this situation, your data might look something like this:

- Sales target = \$1,500,000
- Average dollar value of closed deals = \$100,000

- Closed deals = 15
- Proposals given = 30
- Demos scheduled = 60
- Discovery calls scheduled = 120
- Decision makers spoken to = 480
- Calls made = 2400

Then, break down that data into quarterly, monthly, weekly, and daily goals.

Your goals might look like this:

**Note: As your timeline gets shorter (e.g., daily goals), the math doesn't always translate perfectly. As such, you may want to reserve*

more time-intensive goals for longer timelines (e.g., closing deals on a monthly rather than weekly basis).

Quarterly

- Calls made = 600
- Decision makers spoken to = 120
- Discovery calls scheduled = 30
- Demos scheduled = 15
- Proposals given = 8
- Closed deals = 4

Monthly

- Calls made = 200
- Decision makers spoken to = 40
- Discovery calls scheduled = 10
- Demos scheduled = 5
- Proposals given = 3
- Closed deals = 2

Weekly

- Calls made = 48
- Decision makers spoken to = 10
- Discovery calls scheduled = 3
- Demos scheduled = 2

Daily

- Calls made = 10
- Decision makers spoken to = 2
- Discovery calls scheduled = 1

HINT:

Done Rather than Perfect

The goal of this framework is to add consistency to your daily selling activities. If in a month or two the activity that we calculated up front isn't bringing in enough business, you can simply increase the numbers.

Don't get paralyzed at this stage of the process. You can make the most accurate calculations on the sales activity you need to hit your goal and start chipping away at it.



05. Create Your One-Page Plan

Finally, it's time to create a one-page plan outlining the daily selling activities. Completing these activities each day will lead you to hitting the goal you set for yourself in the first step.

Important: this is not meant to be exhaustive.

Don't treat this one-pager like the single notecard you could bring to class—crammed from edge to edge with information. Instead, this is the minimum activity that you must complete each day to call it a success.

Your one page plan might look something like this.

My Waypoints:

Quarterly

- Calls made = 600
- Decision makers spoken to = 120
- Discovery calls scheduled = 30
- Demos scheduled = 15
- Proposals given = 8
- Closed deals = 4

Monthly

- Calls made = 200
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Weekly

- Calls made = 48
- Decision makers spoken to = 10
- Discovery calls scheduled = 3
- Demos scheduled = 2

Daily

- Calls made = 10
- Decision makers spoken to = 2
- Discovery calls scheduled = 1

My One-Page Plan

- **Want:** To buy a Porsche 911 at the end of the year.
- **Income Goal:** \$400,000 per year / \$1,500,000 revenue generated
- **Starting Point:** \$245,000 in almost guaranteed annual reoccurring revenue.
- **Goal:** \$1,255,000 new business revenue. \$78,000 average deal size.

With your one page plan complete, you now have your daily, weekly, monthly, and quarterly goals set.

No more guesswork. No more wondering if you're on track. As long as you follow and meet your daily goals, you'll hit the income goal you set for yourself.

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You can't in one day get really good at Jiu-Jitsu, obviously. It takes months and years to do that, **but it's you showing up every day with intentional effort that gets you the results that you want.** Prospecting is the same exact thing. You have to make it daily, and it has to be intentional, and you got to do it a long time and have faith in the process."

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Jason Bay, Co-Founder & Chief Revenue Officer of Blissful Prospecting, Salesman.com Podcast.

Time to Execute: What You Need to Know to Get Started

Now that you understand the Selling By the Numbers Framework, let's dive a bit deeper into the details.

What information will you need to establish your way-points? What research will you have to do on your accounts before getting started? And what considerations do you need to include in your calculations?

The specifics will vary among industries and products. But below are some of the most common pieces of information you'll need to consider along the way.

Average Deal Size

How big is your average account or deal size? And how much will you be pocketing as a commission from each sale that you make?

You'd be shocked how many sellers I speak to who don't know this basic variable of sales success.

Average Number of Touchpoints to Close Sale

Is your sales cycle long and complicated? Does closing the sale from start to finish take days, weeks, or even months? How many times do you need to talk to a prospect before they're ready to sign on as a client?

This is another important consideration when building out your milestones. You may have to add daily follow ups to your one page plan if your sales cycle is longer than a couple of weeks.

HubSpot reports that most B2B prospects will need about eight touchpoints before a sale. But every industry is different, so be sure to calculate yours rather than just relying on industry averages.

HINT:

Start Collecting Data Early

The more information you have on-hand, the more accurate your data will be.

Build a routine of recording your order sizes, touchpoints, conversion rates etc into your CRM and reviewing them each quarter.

Is This Even Possible?

This is vital—is this revenue or end goal even possible?

Take a quick look at your team's sales history. How many clients do you bring on per year? How does your goal compare to the highest performing seller on your team?

Ambition can be a great driving force. But goals so lofty that they're unrealistic aren't helping anyone. In fact, they'll likely only end in disappointment.

With training there is always the opportunity to reach the top of your teams leaderboard. But with that said, it might not be possible to close 25x that of your colleagues.

So be sure your goals are ambitious, just not foolhardy.

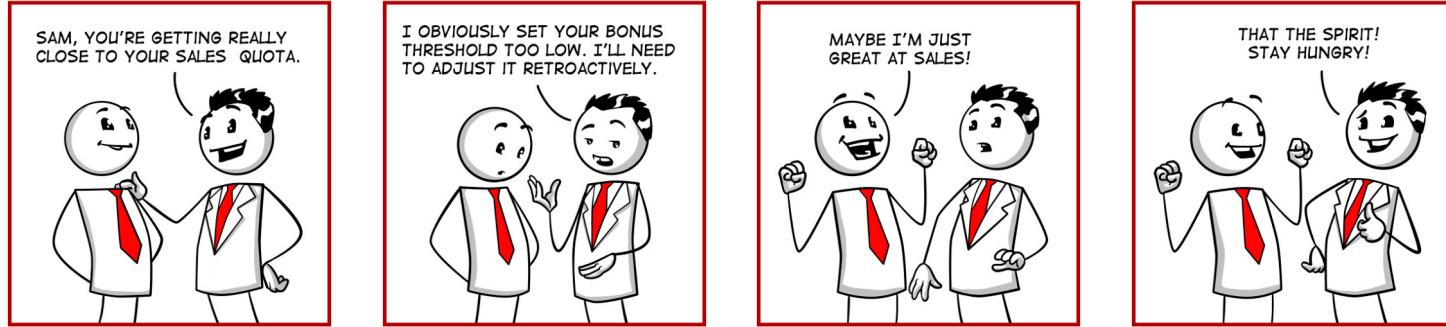
HINT:

Recognize That Different Clients Have Different Needs

Not all of your customers will need the same number of touchpoints before they close. This is *especially* true if those customers come from a variety of lead sources, industries, markets, and backgrounds.

For example, selling medium-high price point accounting software to a Fortune 500 company might have a sales cycle of several months. But it's going to be a much harder sell for *same* software if you're targeting a smaller mom-n-pop store with limited resources.

As a result, you may want to separate your data according to client type. Otherwise, you risk skewing the averages and making selling by the numbers less effective.



Wrapping Up

Maintaining discipline is one of the biggest hurdles sellers face on their journey to sales success.

Some days you may wake up energized and ready to take on the world. But on others, you may feel like you're stuck rolling the metaphorical boulder up a never-ending mountain.

The goal with this framework is to smooth out the roller coaster of ride of boom and bust cycles that most sellers face, so that you can reliably and consistently smash your sales quota, year after year.

That's why it's so important to take motivation out of the picture.

As long as you complete the activities on your one page plan each day, you can rest easy knowing you're making strides towards your goals every single day, even on your worst days.

“

Resilience is moving forward. It's dealing with those challenges but being able to say I have the toolkit, so I *can* move forward. [Resilient salespeople] not only handle the challenges, **but they also hit their numbers, and they also have very high career satisfaction.**”

Beth Benatti Kennedy, Salesman.com Podcast.

02.

Buyer's Journey



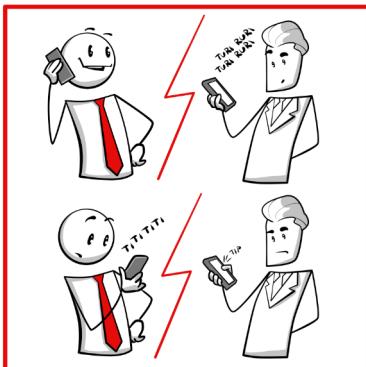
Buyer's Journey

If you don't know where you're going, you'll never get there.

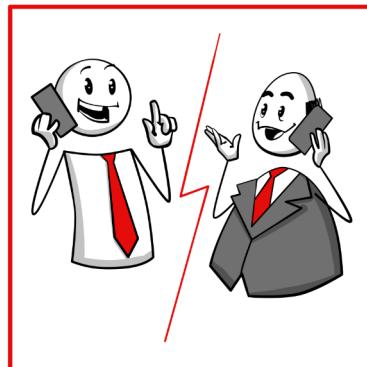
Similarly, if you knew exactly where your buyer was in their buyer's journey, it would be much easier for you to solve their problem with your product.

Sam used to randomly reach out to his buyers. He didn't care if they understood that they had the problem he had solved. He wanted to speak to anyone who would list.

Unfortunately, he found his prospecting to be very hit-or-miss.



One day Sam asked Harry what stage of the buying cycle he was at when he agreed to meet with him.



Harry explained that he was comparing vendors and would be excited to speak to Sam to investigate his offer.

Sam started focusing his cold outreach to buyers further along the buying journey and booked more meetings than ever.

This chapter explains how to break down the steps of the buyer's journey so you can identify when it's best to engage them and understand how to get them from where they are to where they want to be.



Navigating the Modern B2B Buyer's Journey

Times have changed for B2B sellers.

Not long ago, buyers used to do light research on a solution before reaching out to a seller for more detailed product information. These interactions with sellers helped educate buyers about their product.

But buyers also gave away all the power when it came to controlling the buyer's journey as the seller was the gatekeeper to understanding and solving the buyers pain.

These days, however, the buyer's journey is in the hands of the buyer themselves. Pricing, product features, case studies—these sales assets (and many more) are available online. And buyers now move through 70% of the buyer's journey *on their own* before they speak to a rep.

So, how do you navigate this new selling landscape? And how do you determine what

the buyer's journey looks like for your target customers?

That's exactly what this chapter examines.

We'll define the buyer's journey, explain how it's changed over the years (what that means for you), and detail the step-by-step framework that'll help you understand your own buyer's journey.

What Is the Buyer's Journey?

The buyers journey, also known as a customer journey or purchase cycle, is the process your buyers go through to move from being unaware of their problem to purchasing a solution.

The length of a buyer's journey tends to depend on the level of risk involved. For pricier solutions, the buyer's journey is longer. Buyers need to do more research to justify their purchase.

For less expensive solutions, the opposite is true. With less at stake, buyers feel more comfortable making quicker decisions because the "blow back risk" of them making a bad decision is less likely to affect their job security.

As a buyer progresses through different stages of the buyer journey, they'll have different concerns that need addressing before they move to the next stage. And it's *your* job to meet those needs each step of the way.

The better you understand what the buyer needs from you to progress the sale, the more successful your sales efforts are going to be.

Breaking Down the Buyer's Journey Stages

So, what stages do your buyers go through when they set out to solve an issue they're facing? Let's take a closer look.

1. No Awareness

The buyer doesn't know they have a problem. That can mean they're completely unaware of it, or (more likely) they don't realize that a current inefficiency can be fixed.

2. Awareness

The buyer acknowledges the problem exists and seeks out more information about it. A buyer in this stage will respond to content that examines their problem and sheds light on why this problem exists.

3. Exploring Solutions

Your buyer now fully understands the problem they're dealing with so they start researching solutions. They're assessing what solutions are available and which is most likely to fix *their* problem.

4. Comparing Vendors

This is when buyers get into the nitty-gritty. After determining the solution, it's time to drill down into how each vendor stack up against one another. Which has the most valuable features? How do they compare on price? And what services will align best with the buyers business?

5. Purchase Decision

The final stage of the B2B buyer's journey is making a purchase decision. This is when buyers have settled on a solution but still need a bit of a push over the edge to commit to implement it. They need reinforcement that they're doing the right thing. And they need reassurance that this solution is right for them.

Then Vs. Now – What's Changed in the B2B Buyer's Journey?

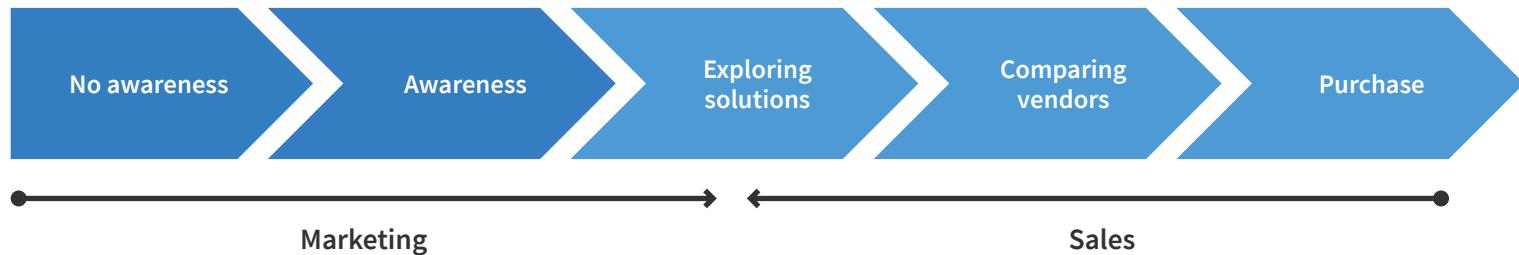
While the stages of the B2B buyer's journey haven't changed, the role of the seller in that journey certainly has. And that's all thanks to an increasingly digitalized sales cycle.

A whopping 77% of purchasers won't talk to a salesperson until they've done their own research, according to HubSpot. And that was in **2015**. These days, the numbers are even higher.

Decision-makers are relying on their own research to learn more about their problems and possible solutions than ever before.

As a result, you need to understand the difference between the old buyer journey and the new buyer journey. So you can interject yourself in the process, at the right moment to guide your buyers and get deals done.

The Old Buyer Journey



In the old days, the seller would shoulder most of the burden when it came to ushering buyers through the buyer journey.

As you can see from the traditional buyer's journey diagram, marketing material would only play a role in informing buyers about the problem and touching on the solutions.

But after that, sellers would hop in to:

- Build rapport.
- Explain the various solutions.
- Differentiate their product from competitors.
- Close the sale.

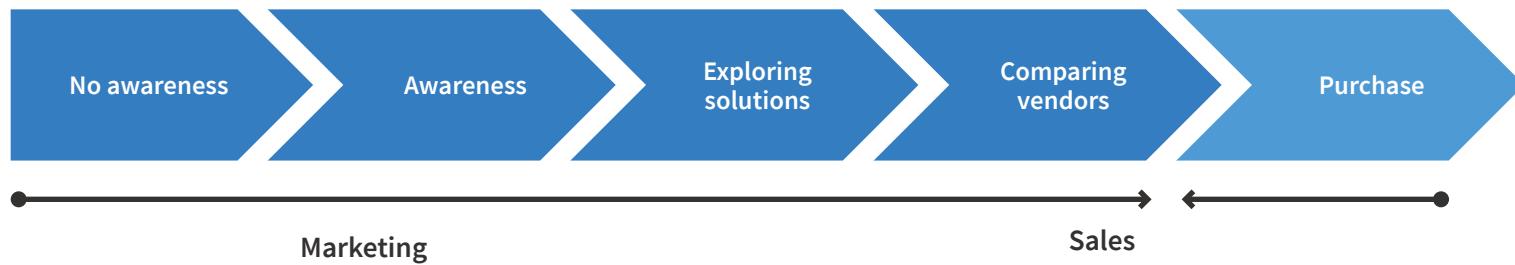
From the third stage on, buyers would get most of their information and educational material from the sellers and not from their own research. This, of course, put a lot of control in the hands of reps.

Sellers could assess where the buyers were in their journey, feed them content and give them the consulting that they needed to move on to the next phase.

These education sales materials might include:

- Articles.
- How-To Guides.
- White Papers.
- Product Spec Sheets.
- Case Studies.
- Demo Videos.
- Product Comparison Guides.
- Free Samples.

The New Buyer Journey



Where the traditional buyer's journey allowed for the seller to control the process, the modern buyer's journey is much more hands-off.

Rather than coming to you for educational materials, buyers now expect to access much of that information on their own. And that's even more true today in a post-COVID era.

A 2020 McKinsey study, for example, found that 70-80% of B2B decision-makers prefer remote human interactions or digital self-

service models vs. "traditional" in-person models. Just 20% of buyers said they hope to return to in-person sales. And that's even in industries where field sales have dominated, like pharmaceuticals and medical products.

Buyers now expect to be able to access the content they need to move through the first four stages of a buyer journey themselves. They want to learn about their problems, possible solutions, and various vendors on their own. Then and only then are they

willing to get on the phone with a seller to understand the finer points of their product.

You may also notice the modern buyer's journey takes longer to complete than the traditional journey. Whereas educating buyers and closing a complex sale could happen in the span of just a few days, most buyers are now taking longer to get to that "yes" decision as the process of consuming content on their own isn't as efficient as speaking to a seller.

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Some of the researchers also said that the sales cycle is getting longer. So the sales cycles seems to extend by about 40%... **Is the close rate getting worse? Not necessarily. So deals are closing; it's just taking a longer time.**"

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Ed Barrett, VP of Sales, EMEA Partner at HubSpot,
Salesman.com Podcast.

What This Shift Means for You

So, what does all this mean for you as a B2B seller? Well, there are a few key takeaways here.

Prepare for a Longer Sales Cycle

Turning a prospect into a buyer is taking longer than ever. Demand Gen Report found about 58% of buyers report their decision-making process is becoming longer year over year.

Part of that is due to more readily available competition. With so many products ripe for the picking in the digital world, B2B buyers have a plethora of options to choose from. Some of those options won't be right for the job, of course. But even still, simply weeding through all those bad-fit products out there takes time.

On top of that, B2B deals are becoming increasingly complex. On average, it takes input from 6 to 10 decision-makers to settle on a solution, according to Gartner. That means there are bound to be more emails, product demos, sales calls, and nurturing cycles than most B2B salespeople were used to even a decade ago.

HINT:

What You Can Do About It

Here's how you can adapt to a longer sales cycle:

- Avoid pushy sales tactics and adopt an educational attitude.
- Develop a solid sales cadence to keep prospects engaged over the longer sales cycle length.
- Build and deliver educational content to your buyers at each stage of their buyer journey.
- Track what content your buyers have engaged with so you understand when to step in and what content drives interactions.

Focus on Strategic Content

In the world of modern B2B sales, the seller with the best content is king.

These days, buyers are interacting with content more than ever before. Research from FocusVision found that B2B buyers now consume at least 13 pieces of content before making a buying decision.

That's why it's so important for you to make the shift to creating valuable, customer-focused content for every stage of the buyer's cycle.

On the one hand, it reinforces you as a thought leader.

Great content, then, builds trust. And it funnels more buyers into your pipeline.

Beyond that, great content also caters to your buyers' desire to move through the cycle at their own pace. You're meeting them where they want to be rather than forcing them into a journey they don't want to participate in. And *that* is how you appeal to modern buyers to influence their buying decisions.

We cover "insight" content creation in the Social Lead Generation Framework later in the book.

HINT:

What You Can Do About It

Here's how to maximize the value of your content:

- **Take Deep Dives** – Superficial overviews of problems and solutions don't do much to sway your buyers. They're interacting with your content because they want answers. And if your content doesn't provide those answers, they're going to find them somewhere else. So be sure you're putting the time in to *really* explore the questions your buyers want answered.
- **Get Inspiration From Past Customers** – Even the most thorough content won't mean a thing if it doesn't hit the pain points your buyers are *actually* going through. So take some time to survey current and past customers to get a better understanding of what caused them to buy in the first place. What questions did *they* have that other future buyers may be asking themselves now?

Equip Yourself With Alignment Tools

You've already seen how the modern buyer's cycle is *heavily* dependent on delivering quality, educational content.

In the old world, you would know exactly what content your buyer is consuming because, well, you showed it to them. But with so much research and engagement happening online before you even speak to a lead, you need to know exactly what your buyers have interacted with beforehand. That's where your CRM tool comes in.

With the right CRM (customer relationship management) tool, you'll have a complete record of which content leads have already consumed and where they may be at on the buyer's journey.

You can go one step further with "sales enablement" software if you value tracking your buyer's journey in more detail too.

HINT:

What You Can Do About It

Here's how you can get the most out of your alignment tools:

- **Automate Without Losing the Human Touch** – One of the best things about a CRM is that many have built-in automation features. These features are admittedly great. But don't get too swept up in them. You need to be sure you're keeping all your touches personal, valuable, and aligned with your value proposition (covered in the Value Proposition Framework). If you don't you run the risk alienating your prospects (especially when your outreach is obviously automated).
- **Put in the Effort** – A CRM's data is only as good as you make it. That's why you need to be sure you're putting in the effort to record the type of data that truly matters.

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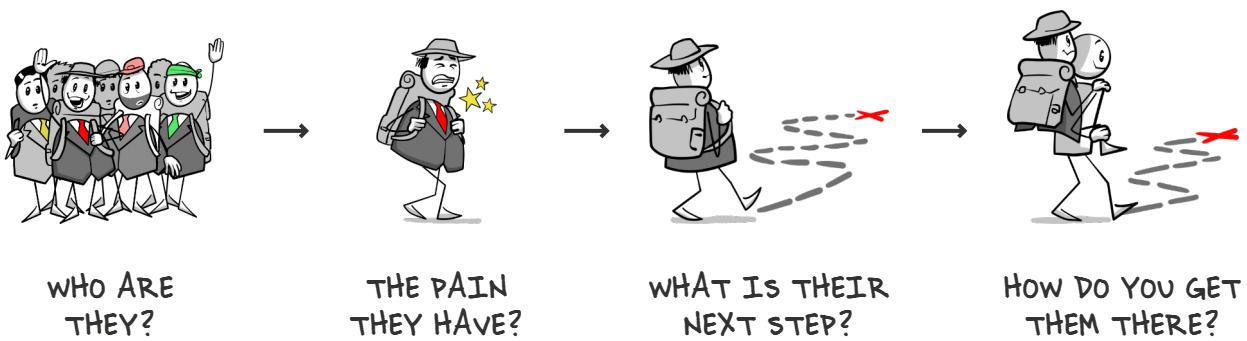
With CRMs, you reap what you sow and what a lot of salespeople don't do is they don't put into the CRM what they need to get the best out of it, and it's the same with Navigator."

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Andrew Grant, Salesman.com Podcast.

The Buyer's Journey Framework

To figure out how your own customers are moving through the buyer's journey, you need to take into account the following factors:





01. Who Are They?

The first step of the Buyer's Journey Framework is refining your ideal customer persona or ICP. Because before we can learn their journey, we have to understand who the buyer is.

As you might have guessed, an ICP is a description of your *perfect* buyer. These are the buyers that:

- Are easiest to close.
- Experience the pain point you solve.
- Understand your product's value.
- Offer the fewest objections.
- Are urgently ready to buy.

Buyers with these attributes have a *shorter* sales cycle, a *higher* profit margin, and ultimately make your life easier as they are easier to close.

These are the buyers you should be laser focused on finding.

To build out your ICP, work through your past buyers and look for similarities. Identify what makes those buyers great in the first place. To make things practical, each ICP should document seven essential components.

- **Job Title** – Is your ideal buyer a mid-level buyer or a C-suite executive? Not every selling strategy will work for the same job title.
- **Industry** – What industry is your ideal buyer in? The more similar the industries, the closer your messaging can be when connecting with them.
- **Location** – Where are they located geographically?
- **Company Size** – How big are they? Are we talking a small mom-and-pop or a several thousand employee conglomerate?

- **Current Goals** – What are they trying to achieve this month, this quarter, this year?
- **Main Pain Point** – This is a big one. What's the biggest problem they're dealing with right now? The more specific, the better.
- **Current Solution** – What are they using right now to deal with that pain?

As you continue to refine your ICP, you can start incorporating other details too. For instance, you may want to also include their customer base and target market. Or maybe your ICPs also have very similar motivations that keep them moving through the sales process. These can all be valuable details when refining your ICP.

HINT:

But I'm Not Sure?

Each of the seven essential components of your ICP falls into two types of variables:

1. **Facts** – These are the concrete details that we can confirm. We can use software, Google search or even a quick phone call to confirm these details.

Examples: Job titles, industries, locations, company size.

2. **Hypotheses** – These details are what we're only able to guess about the account using the limited data we have. However, it's hard to confirm these criteria without speaking to the clients directly.

Examples: Current goals, pain points, current solution.

When you're first identifying your ICP you might not get it perfectly right. That's OK.

The goal here isn't perfection, it's to create an ICP that we can aim towards with the rest of our prospecting efforts.



02. The Pain They Have?

Next up is determining the pain points your ICP is experiencing.

There are going to be specific pain points associated with each stage of the buyer's journey.

To give you an idea of where to start, let's look at common pain points for each step of the buyer's journey.

STAR HINT:

Word-of-Mouth Is Key

Determining your ICP's pain points is tough when you're first building out your buyer's journey. You can guess and suppose all you want. But even the most astute seller is going to miss out on the real motivation drivers of their customer base.

That's why you should always survey your current and previous buyers to learn more about their pain points.

Oftentimes you can uncover gamechanging insights with a simple friendly email.

1. No Awareness

- I know my business can be run more efficiently, but I don't know how.
- Can we generate more revenue?
- Is it possible to attract more qualified talent?

2. Awareness

- There is a gap in our processes that I need to understand better.
- We are missing out on earning potential, let's figure out why.
- There is a problem in our business, we just need to give it a name and define it.

3. Exploring Solutions

- We don't know which solutions will solve our problem.
- We don't know which solutions apply to our business model.
- We don't know which solutions are available in our industry.

4. Comparing Vendors

- Which product offers the features we need to make this a successful solution?
- Which product offers additional features that increase their business value?

5. Purchase Decision

- I'm concerned this isn't the right decision and need reinforcement.



03. What Is Their Next Step?

Next, you'll need to define where the buyer is heading. Are they moving from "awareness" of their problem to "exploring solutions" to solve it? Perhaps they're already "comparing vendors" and they are ready to make a "purchase decision".

Where your ICP is in their buyers journey will determine; if you prospect gently or assertively, your value proposition, how rapid your cadence touches need to be and much more.

HINT:

Don't Get Overzealous

It can be tempting to try and shorten the buyer's journey (and thus the sales cycle) by pushing later-stage sales engagement too early in the journey. For instance, you may think pitching your product when the buyer doesn't have awareness of their problem might speed things up.

But it turns out that smoother transitions between stages are actually better for end close rates. So be sure your engagement with your buyers is directing them to the next stage of their buying journey.

Otherwise you'll startle them, come across as salsey and get ghosted if you try and move them too fast.



04. How Do You Get Them There?

For most stages of the buyer's journey, the answer here is going to be **valuable insight content or conversations where you share market knowledge.**

Content however scales best and should be the backbone of your buyer's journey. And content (not pushy salesmanship) should be the driving force of what moves a buyer from one stage to the next.

You don't need to create all of this content yourself. That is what your marketing team is for. Leverage their content to nudge the buyer to their next step until it's time to jump on a call with them.

But what type of content or insight works best for each stage?

Here are a few examples of the best content types for each stage of the buyer's journey.

1. No Awareness & 2. Awareness Stages:

- Blog posts.
- Social media posts.
- Educational webinars.
- Checklists.

3. Exploring Solutions Stage:

- How-to video.
- White-papers.
- Ebooks and in-depth guides.

4. Purchase Stage:

- Sales calls.
- Consultation offer.
- Discounts.
- Live demo.
- Free trial.

5. Comparing Vendors Stage:

- Product comparison guide.
- Product spec guides.
- Case studies.
- Reviews and testimonials.

HINT:

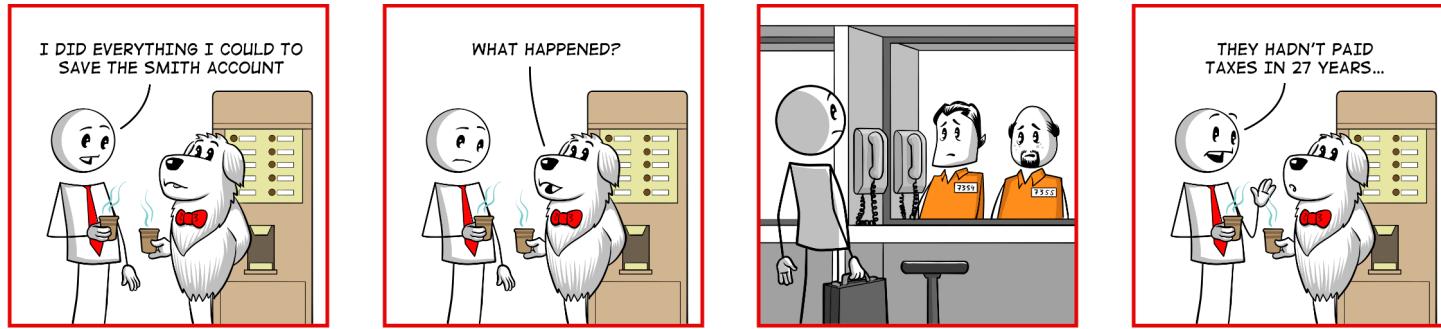
Build Nonlinearity Into Your Approach

Not all buyers will move through the buyer's journey stages linearly. Some will start at No Awareness and move smoothly up through Comparing Solutions, only to jump back to Awareness content.

That's okay. Remember, you're not in control of your buyer's journey. Instead, you're a trusted adviser who can help nudge them in the right direction.

The modern B2B buyer's journey is a complicated one. And the more you can cater to that complicated journey, the more likely your buyer will be to stick around and *want* to engage with you.

The goal is to provide your buyers with the information they **need**, not **what** you want them to have.



Wrapping Up

The buyer's journey isn't the same as it used to be. Buyers have more control over their progression. B2B salespeople need a more sophisticated content and insight sharing strategy to nudge the buyer in the right direction.

And while acclimating to this new B2B sales landscape may take some adjustment, you will progress your prospects through the sales process if you focus on helping them rather than helping yourself.

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Customer success is really understanding the journey that the customer is on, and the problem that you're solving as a solution and finding a way to align yourself as a company with getting those customers to achieve that end. And I think it's really about aligning the business and the solution with the goals of the customer and helping execute on that.”

Peter von Burchard, VP sales Wistia,
Salesman.com Podcast.

03.

Value Proposition Creation

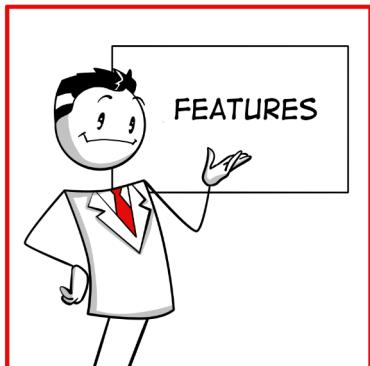


Value Proposition Creation

If you can't communicate something of value, nobody will listen.

The same thing is true when creating a value proposition. If your buyers don't care about the problem you solve and how you solve it, they'll never respond to your outreach.

Brian told Sam and Walter to share the product features that marketing gave them in their cold outreach.



Sam did this and booked no meetings.



Walter pondered the problems he knew his buyers had as he'd interacted with hundreds of them over the years. He included these pain points in his cold outreach efforts and filled his calendar with meetings.



This chapter explains how to create a such a strong message, that your buyer's would feel stupid if they didn't book a meeting with you.

Uncover Your Value Proposition

Your value proposition is a foundational part of your sales process.

It clues you in to your buyer's biggest hopes and fears. And it guides your strategy for closing deals.

But what happens if your value proposition is *wrong*? What if the value proposition that marketing told you to focus on isn't really a fit for your buyers? What if all those unclosed leads who said your product "just isn't right" for them... were actually right?

This chapter takes you through how to uncover and develop your value proposition. You'll learn how to determine your products value, how this tickles their desires and then develop a value proposition to link the two together.

What Is a Value Proposition?

Before we get started on the Value Proposition Creation Framework, let's first define what a value proposition is.

Simply put, a value proposition is a promise to your buyer about what you have to offer. It should be free of jargon and painstakingly clear. It should communicate the benefits of choosing you over the competition. And it should also identify who your ideal buyer is.

Why Is It Important?

The more aligned your product is with your buyer's needs, the *easier* it is for your buyer to agree to work with you. Your value proposition is all about communicating that alignment.

Here are some stats to drive the point home:

- According to buyers, one of the top ways (**61%**) to create a positive sales experience is to provide information that's *relevant* to their problem. Taking the time to really listen to their needs (**69%**) is even more important. (HubSpot).

- The majority (**67%**) of lost sales are as a result of sales reps not properly qualifying their potential customers before taking them through the full sales process. (Business 2 Community).

Sending the *right* messaging to the *right* buyers—matters. It's so important that you can't rely on any value proposition that gets handed down to you from some marketer who has never actually spoken to your buyers. To uncover an effective value proposition, you need to create it yourself.

And that's where the Value Proposition Creation Framework comes in.

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You can be the smartest person in your industry but if you cannot connect and engage, if you cannot communicate the value of that product to solve the problem, **I don't think it matters how smart you are.**”

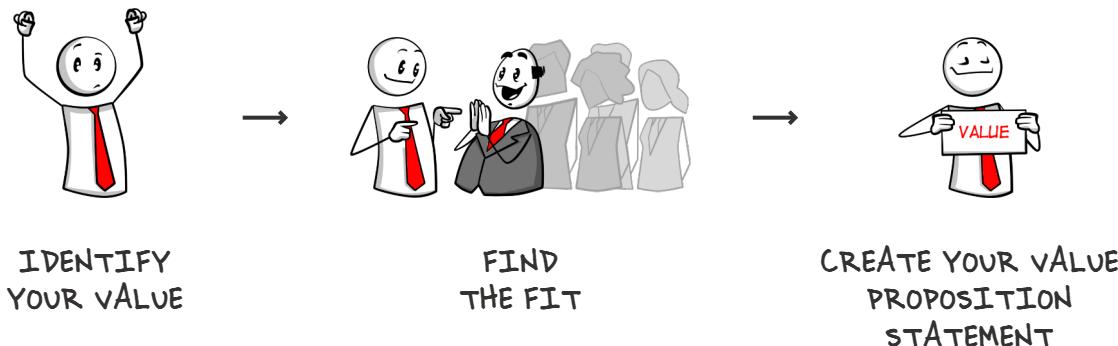
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Stacey Hanke, Speaker, Author, & Communications Expert, Salesman.com Podcast.

The Value Proposition Framework

As you can see, figuring out your unique value proposition can make the difference between your cold outreach booking meetings and it failing completely. So the question is, how do you create yours?

All it takes is following our three-step Value Proposition Framework:



Value Proposition Creation Diagram

The first two steps of the framework require you to create value proposition creation diagram. This is an example of what the diagram should look like. So grab a pen and paper and lets get to it.

YOUR VALUE

A. Products

B. Value producers

C. Pain reducers

D. Fulfilled desires

FIND THE FIT

E. Buyers jobs

F. Wanted improvements

G. Unwanted pains



01. Identify Your Value

The first step of the framework requires you to determine what your products bring to the table. We'll start by defining:

- A. Your Products.
- B. Value Producers.
- C. Pain Reducers.
- D. Fulfilled Desires.

As a seller, you're probably well versed in the value your products can add to your buyer's life. In fact, you might already have oodles of product specs, use cases, and benefits ready to share with buyers.

Even still, it's important that you go through the steps of filling out these sections from the ground up. In my experience, when you run through this process, there are usually at least a couple of new angles of value that get identified which could make a big difference in your messaging.

A. Your Products

The first thing to do is to list out all of the products that you sell.

You can take two approaches here—you can stick to products that only apply to a specific buyer segment, or you can create an exhaustive list of everything that you sell.

After listing out your products, rank them in order of importance. Your flagship products will be at the top, with upsells and supplementary offerings closer to the bottom.

B. Value Producers

Next are your value producers. Building from your product list, identify what benefits or value adds do those products offer to your buyers? How do they help move the needle in a positive direction for the buyer?

Here are a few questions to get you started. Does your product...

- Outperform similar products?
- Offer cost savings?
- Make your buyer's job easier?
- Create positive social consequences (e.g., boosting reputation at work, giving them more power).

Be sure to rank the value producers that you come up with in order of importance, too.



HINT:

Be Realistic Here

As a seller, you're probably a *bit* biased about all the great things your products have to offer.

But when you're mapping out your value proposition, you need to be 100% realistic with what your solution can and can't accomplish. The last thing you want to do is set false expectations about the results your buyers will achieve with your product.

Inflating your value producers and stretching the truth about your products capabilities will lead to a tarnished reputation, zero return buyers, and an empty referral pipeline.

So instead, be honest—both with the buyer and with yourself.

“

If there's one lesson to take, **it's to be refreshingly honest...** If you're really honest with people, it's harder for them to reply negatively.”

99

Jon Buchan, Cold Email Specialist & Director of Charm Offensive, Salesman.com Podcast.

The more extreme the pain / value, the more extreme the action taken



C. Pain Reducers

Think of your pain reducers as the Yin to the Yang of your value producers. How do your products eliminate hardships in the day-to-day of your buyer? What do they do to make their jobs less frustrating?

Once you've listed your pain reducers out, don't forget to rank them in importance.

Some questions to get you started. Does your product...

- Fix frustrating problems in another product?

- Eliminate financial, social, or technical risks?
- Limit or eliminate common mistakes buyers make?
- Overcome obstacles that keep buyers from achieving greater social power or status?

D. Fulfilled Desires

Most value propositions and even sales conversations end with a surface level value being added or pain being reduced. To really impact your buyers and to make their decision to work with you easy, we need to go a step deeper.

You need to get to the “desire” level of value or pain. The value that you can offer to a buyer can be communicated in three discrete levels:

- **Feature** - Salesman.com Academy has step-by-step training videos.
- **Benefit** - The training videos will help you better implement our frameworks.
- **Desire** - We will take all of the stress and overwhelm away from executing an effective sales process and achieving your financial goals.

The third layer of value which we call the desire layer is what really motivates buyers to book meetings, complete the paperwork and get your product installed.

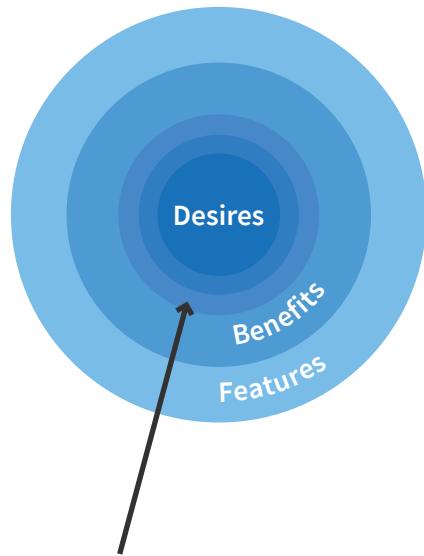
It's simple to uncover the real desires behind your value producers and pain reducers. To identify the desire, for each benefit that you jot down ask yourself the question “why would a buyer give a shit?”

This simple question does something magical. It takes you out of your seller's mind and puts you in the mind of the buyer. If the answer to the question is “they don't care...” then the value producer or pain reducer that you've listed down should be eliminated.

If there is a strong desire that can be realized by a value producer or pain producer that your product offers, then you might have the building blocks of a world class value proposition in your hands.

The goal with this step of the framework is to list a crap ton of features and benefits but then qualify them against the desires of the buyer.

This qualification process will leave you with a hand full of strong value producers and pain reducers that really get your buyers' desires salivating with excitement.



Keep asking “Why would they give a shit” until you've peeled back all the layers and revealed the true desire that will lead a buyer to take action.



02. Find the Fit

Now it's time to focus on the buyer, independent of your product. This step of the framework is all about describing:

- E. Your Buyer's Jobs.
- F. Wanted Improvements.
- G. Unwanted Pains.

The more that you understand your buyers at this point, the more likely you are going to be able to understand their needs.

If your understanding of your ideal buyer is a little hazy, then make a hypothesis of what you think their needs might be and then we can test these predictions in the next framework.

E. Buyer Jobs

What are your buyers trying to get done? What are the tasks they are performing? And what are their goals? Examples of buyer jobs could be:

- Putting on a conference.
- Achieving a specific revenue goal.
- Improving the output of their department.
- Procuring solutions to solve a problem.
- Advancing up the corporate ladder.

Don't think of this just as simple work duties (remember, your buyers are humans just like us sellers... I know crazy, right). Instead, buyer jobs break down into three unique categories:

- **Functional Jobs** – These are the typical things that come to mind when you think of jobs. They're the individual tasks they have to get done

at work (e.g., input information into their CRM, update accounting information, fill out time-sheets).

- **Social Jobs** – These jobs are focused on looking good, gaining power, or rising in status. In the workplace, that translates into goals like looking professional, proving competence to the higher-ups, and expanding the team they manage.
- **Personal/Emotional Jobs** – These jobs concern a buyer feeling good. Peace of mind, elimination of risk, feeling accomplishment, and reducing stress at home fall under this category.

List out jobs that relate to the products that you listed in the first step of the framework.

HINT:

Conduct Buyer Interviews to Better Understand Buyer Jobs

As you run through the exercise, you'll quickly see that your buyers have a lot of different jobs. And unless you have worked in the role that your buyers currently reside in, you'll have missed a bunch more.

So how do you figure out what those additional jobs are?

One of the best ways to uncover your buyer's jobs is to ask them. Conducting existing buyer interviews is a great tactic for deepening your understanding of what makes them tick.

Specifically, you should focus on; what made your buyer abandon their previous solution and adopt yours, what other problems your buyer had when they chose to work with you and which one of those other problems was the highest priority.

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So, step one, interviewing five customers using an approach called jobs-to-be-done. It's a framework that allows you to understand all of the dominoes that tipped over that **actually caused someone to fire their existing thing and hire the new thing**, that's going to form the basis of your messaging."

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Josh Braun, Author & Founder of Josh Braun Sales,
Salesman.com Podcast.

F. Wanted Improvements

These are the benefits your buyer wants to see from your product. They're the concrete outcomes of working with you. These improvements can apply to any of the jobs listed out previously. The more exact and specific you are here, the better.

While brainstorming these improvements, try to think about:

- What precise quality levels do they expect?
- What would make your buyer's job easier?
- What kinds of positive social consequences would make them eager to buy?
- How do they measure success and failure?

Improvements can come in four different categories. Try to come up with at least couple for each and then rank them in order of importance to the buyer.

- **Required Improvements** – These are the bare necessities. They're what the buyer absolutely needs to see from your product. If the buyer wanted to purchase a car for example, the vehicle would have to get them from A to B reliably.
- **Expected Improvements** – These are a step lower in necessity but are still expected. Solid design and safety standards for the car might be an expected improvement.
- **Desired Improvements** – These are improvements that go beyond what your buyers anticipate in your solution. Sticking with the car metaphor, this type of improvement might be the car connecting seamlessly with your mobile device.
- **Unexpected Improvements** – These improvements go above and beyond customer expectations. They're the blow-away qualities that buyers don't even imagine having. Being able to run on electricity might be an unexpected perk of a new car.

G. Unwanted Pains

Last up is your buyers unwanted pains. What annoys your buyer before, during, and after they try to get their job done? What prevents them from starting? What risks keep them up at night?

Questions you might ask yourself while brainstorming unwanted pains might include:

- What takes too much time, costs too much money, or requires too much effort?
- What are the biggest difficulties facing your buyer when performing their job?
- What keeps them up at night when it comes to their role?
- What risks outweigh the benefits of performing a certain task?

Once you've a solid list of unwanted pains, like in the other sections, rank them in order from most painful to least.

Finding the Fit

Now that you've completed the 'Your Value' and 'Find The Fit' sides of the value proposition worksheet, it's time to determine "fit" between them. The better the fit between your product and the desires of the buyer, the more successful your value proposition will be.

So, how do you determine fit?

Simple—draw lines between any of the fulfilled desires of your product with the related wanted improvements and unwanted pains that your ideal buyers have.

These are the elements that your buyers want to hear about. These are the layers of value that matter.

Well done. You've completed the one of the most challenging exercises in this book. All that's left is crafting your value proposition statement based on the value that you've just highlighted.

Best Practices

- **Forget Specifics** – Try not to pigeon hole yourself with what you think your buyers want from you. Instead, you'll want to get as many varied ideas on the board as possible. You're going to go through them to determine if they're a fit for your buyer later on. So for now, let the ideas flow!

- **Stick With a Single Buyer Segment** – Different buyers will have different needs, wants, and pain points. So be sure you're only using the segment that lines up with your chosen product line and stick with it.
- **Make Your Wanted Improvements And Unwanted Pains Concrete** – There's value in specificity when it comes to listing out these two categories. Don't just write down "it's too slow" as an unwanted pain. Instead, try to put down how much faster they want to get the job done. That way, you can parse out exactly what their standards of success and failure are.



03. Create Your Value Proposition Statement

Once you've whittled down the value that your product offers to just the few elements that your buyer actually cares about, it's time to craft your value proposition statement.

A value proposition statement is a short, snappy sentence that quickly and effectively communicates the value that you offer to the market.

Your value proposition statement will be the cornerstone of your sales process. It'll inform the content in your cold outreach, how you build rapport, which points to hit when

following up with leads, and what strategies to use when closing the sale.

The best value propositions fulfill a number of guiding principles. They:

- Target only a few jobs, desires, wanted improvements and unwanted pains (make peace with not being able to solve every problem your buyers have).
- Align with how the buyer measures success.

- Don't just target functional jobs (be sure to address social and emotional jobs too).
- Focus on unsatisfied jobs, lingering strains, and wanted improvements.
- Differentiate your product from the competition (why you and not them?).

Value Proposition Statement Templates

A value proposition statement should be clear, to the point, and touch on the most important points that you highlighted in the Value Proposition Creation Diagram.

Here are two templates that you can use to create a powerful value proposition.

A. X, Y, Z

This is the simplest value proposition statement template. Swap out the blanks for your own variables:

I help [X person], solve [Y problem] by doing [Z thing].

Example: Salesman.com Academy, helps B2B salespeople find and close more sales in the next 30 days or their money back, with step-by-step selling frameworks and unlimited coaching.

B. For, Do, Does, Desire, Unlike

The other template that will help you build out your value proposition statement looks like this:

We help [for], [do]. Which [does] and [desire]. [unlike].

Example: We help salespeople find and close more deals. Which reduces overwhelm and increases job performance. Unlike traditional sales trainers who haven't evolved with the way the modern B2B buyer wants to be sold.

HINT:

Use the Language of Your Target Audience

Your value proposition statement is equal parts science and art.

On the science side, your goal is to communicate the value that you offer to a buyer who wants it. The art comes in is *how* you communicate that value.

Different types of buyers will use different types of language to define their problem, identify their solution, and generally conduct business from day to day. And if you can tap into that language—understand it and *use* it in your statement—you're going to be much more appealing than the competition who doesn't.

So when crafting your value proposition statement, be sure to use the voice of your buyer.

- How do they speak?
- What industry terminology do they use and understand?
- How would they like you to communicate this message to them?

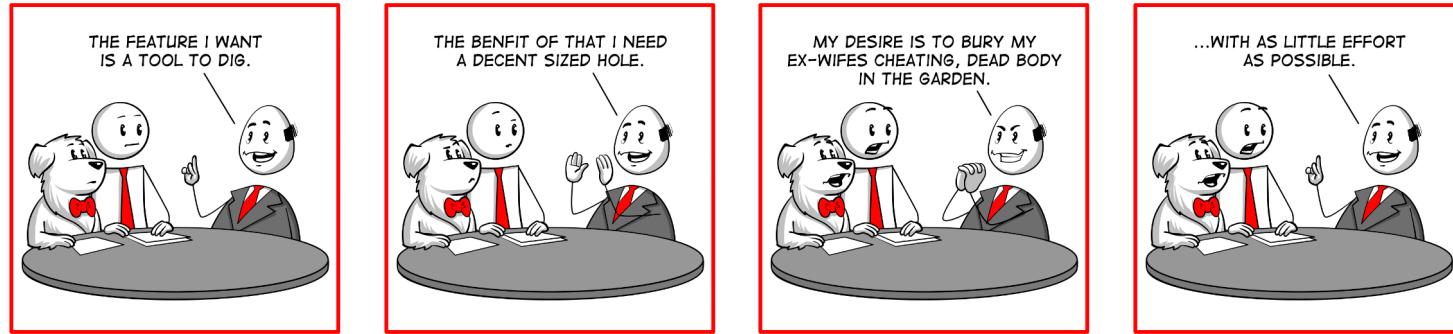
These are all great questions to investigate that will help you absorb the way your buyer's speaks.

“

Understanding how to reframe your value proposition based on your customer's perception of value **is the key to unlocking sales during times of change.**”

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Julian Reading, Sales Enablement Expert & CEO of Sales Journey UK, Salesman.com Podcast.



Wrapping Up

A strong value proposition is a huge competitive advantage in a market of sellers who can barely communicate basic features and benefits. An effective value proposition:

- Positions you as an expert who knows their buyers. Your buyers in turn are more likely to respond to your outbound messaging and book a meeting.
- Allows you to very quickly qualify if a buyer is a good fit based on their reaction to your value proposition.

04. Building Buyer Lists

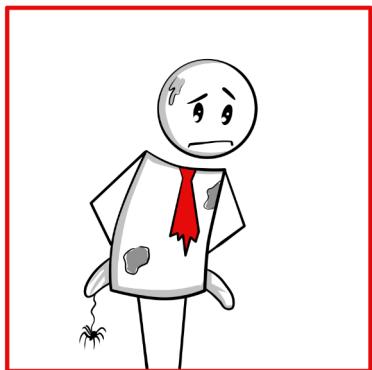


Building Buyer Lists

If you don't know who to contact, it's difficult to contact them.

Similarly, your pipeline would always be full if you had a new list of buyers to add to it each month.

Sam faces a constant battle of feast and famine month to month with his sales results.



Sometimes he has enough prospects to work on, and other months he has no one to spend time with.

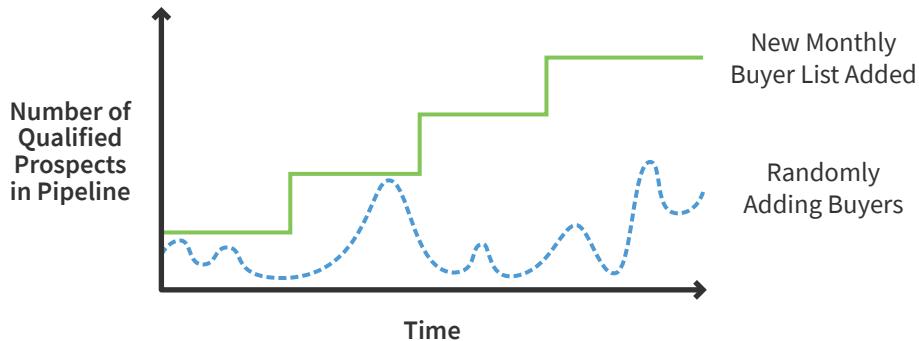


Walter systematically builds a new list of buyers each month. He knows that if he adds 50 leads to the top of his sales pipeline, he will book 20 meetings and close 5 sales—more than enough to beat this sales quota.

Sam jumped off the roller-coaster of sales that he was riding and started taking Walters approach. He's now much more consistent with his selling results.



This chapter explains how to create a list of buyers that are qualified against an ideal customer persona so that you can add momentum to any sales funnel at any moment (no matter if you're currently ahead or behind your quota).



Being Strategic With Your Lists

There's a huge misconception in sales.

For most sellers, the focus is always on closing. Hitting the right pain points, plugging power words into the pitch, reading body language—that kind of thing.

Unfortunately the *foundation* of success in this business isn't how you close. Instead, it's talking to the right people, who are at the right place in the buyer's journey, often enough so that they convert into sales.

Getting in front of the right buyers is key to making your job easier and more lucrative.

“

If you are sick of being rejected, if you’re sick of people ghosting you, if you’re sick of people not replying to your messages, **improve your qualification at the top of the sales process**, and you’ll eliminate a lot of that at the far end of it.”

Daniel Disney, Founder/Owner of The Daily Sales, Keynote Speaker, & Author, Salesman.com Podcast.

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Why Bother Building a Prospecting Lists?

Before we dive into the buyer list building framework, let's hit the "why" behind it all.

Why should you bother going through the effort of building a buyer list at all? Can't you just stick to the old method of focusing on closing buyers when they randomly fall into your lap as inbound leads?

Of course you can!

But building a buyer list lets you sell more efficiently. Here's why.

You Can Focus Your Energy on the Best Potential Buyers

Say you've got a *perfect* product. It solves a major pain point. It's affordable. And it's easy to use.

Well guess what?

You're *still* not going to be able to close every buyer you talk to. There are millions of reasons your prospects don't buy:

- Budget.
- Timing.
- Misunderstanding of value.
- Cheaper competition.
- Distractions.
- Risk.
- Lack of urgency.

The sad truth of sales is that you can't win 'em all. In fact, Sales Insights Lab found that 50% of prospects you talk to won't end up being a good fit for what you're selling.

So rather than wasting time with prospects destined not to buy, why not put your energy into finding buyers that are more likely to say yes?

That's what a great buyer list does—it lets you define (and refine) who your best leads are while weeding out those who aren't a good fit. And for you, that means a much better close rate. More sales, less effort.

Makes Your Sales Activity Clear

So much of a sellers day is wasted on task uncertainty.

Should you be following up with leads and booking a demo? Is your time best spent prospecting for new buyers? When do you nudge buyers in the decision stage of the process?

With all this indecision, it's no wonder why sales reps spend just 32% of their time according to the SalesCode Assessment actually selling. The rest is spent on admin, meetings, data entry, and waffling on what to do next.

Without a doubt one of the **best** ways to maximize productivity is by having a new list of prospects you can reach out to if you have a free minute. Rather than sifting through LinkedIn, checking backgrounds and qualifications, you can just move down to the next name on your buyer list.

So rather than fumbling with indecision, you can keep on pushing forward.

Speeds Up Your Prospecting

HubSpot reports that prospecting is the most challenging part of a sales job (40%), followed by closing (36%) and qualifying (22%).

Prospecting takes time—a **lot** of time.

And when you consider it takes an average of 18 calls to actually connect with a buyer, it's easy to see why.

In the short run, building out your ideal customer persona (ICP) and buyer list takes a bit of work. But when it's done, you can smash through the process in batches much quicker than trying to prospect one person at a time.

When you build a buyer list you're also only interacting with qualified leads—those who are much more likely to buy. That means fewer objections, less feet dragging, and a shorter sales cycle.

Lets You Refine & Scale

Your buyer list is a living document—it grows, it changes, and it lets you scale.

If for example you aren't getting enough meetings booked or your prospects aren't properly qualified, it means there's something wrong. Your ICP is off, and your data gathering is broken.

The solution?

It's time to **refine**. You can *continually* go back and adjust your buyer parameters to narrow down who is going to be a fit for your product. And once that cycle's done, you can go back again and keep refining.

Within a few cycles, you can go from a measly 2% booking rate to a comfortable 20% (with the right strategy).

Beyond refining, you can also **scale**.

Say for instance you're booking meetings at a great rate. Well now you can scale by ramping up your daily outreach activity and increase the size of your prospecting list.

The best thing about it is the control is in your hands.

“

The number one most important factor for Salesforce productivity was task clarity. If the salesperson knew what he or she **wanted to accomplish, they got it done.**”

**Jonathan Byrnes, Author & Senior Lecturer at MIT,
Salesman.com Podcast.**

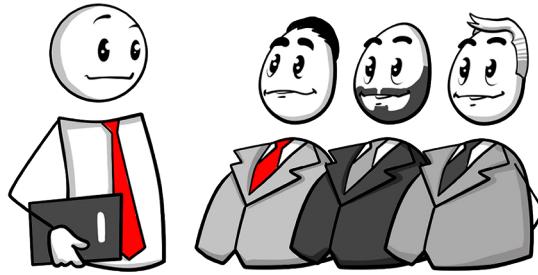
The Buyer List Building Framework

There are some very clear benefits to building a buyer list—that much is clear.

So the question is, how do you do it?

The buyer list building framework has three steps:





01. Create Your Test Audience

Now that you have an outline of your ICP from the buyers journey framework, it's time to put it to good use by creating your test audience.

Your test audience is going to be your R&D center—where you determine what's working and what isn't.

You're going to build a small list of buyers that match your ICP and then validate that list by entering them into the sales cadence you're going to build in the sales cadence framework.

Depending on the success rate of your outreach, you can then scale up your audience **or** go back to the drawing board and refine your ICP to get better results.

But for now, let's look at one of the biggest issues sellers have when building their buyer list—how to find the contact information for the buyers we want to add to our sales cadence and connect with.

LinkedIn Sales Navigator

Right now, the best way to create a test audience is by using LinkedIn Sales Navigator to uncover your ICP's and build your initial test buyer list.

Sales Navigator is a LinkedIn-based tool that lets you uncover the right buyers to add to your list using a variety of powerful search tools.

Plug in the 7 variables that you documented when creating your ICP in the previous chapter and you'll get a full list of everyone on the platform that matches these variables.

Pretty cool, right?

Plus as you *expand* your ICP, you can also add in more of the 44 different search metrics including:

- Company revenue.
- Relationship (companies where your current connections work).

- Department size.
- Fortune (listed on Fortune 50/100/500).
- Recent senior leadership changes.

There are tons of details to play with on Sales Navigator.

But be careful—your results are only going to be useful if you've built a strong ICP in the previous buyers journey framework.

If you haven't already closed deals with buyers very similar to your ICP then your ICP is not yet validated.

If you have closed a bunch of deals with buyers similar to your ICP then you can consider it a validated ICP.

Here's the audience size I recommend for each:

- **New/Unvalidated ICP** – 50 people.
- **Validated ICP** – 250 people.

Determining Your Audience Size

Now that you have the power of LinkedIn Sales Navigator at your fingertips, it's time to build in your list.

But how many leads are right for you? This all depends on whether your ICP is validated or not.

“

Sales Navigator is full of tools, but those tools are only good if you use them and you use them properly... If you are going to invest in LinkedIn's Sales Navigator, **get some training as well.**”

”

Daniel Disney, Founder/Owner of The Daily Sales, Keynote Speaker, & Author, Salesman.com Podcast.

Grab Their Contact Information

Gathering the contact information of your potential buyers has never been easier. With a relatively cheap subscription from LeadIQ.com or Seamless.ai and installation of a browser plug-in. These tools will pull your buyers information and add it to a list with the touch of a button.

You will need to document the buyers:

- First name.
- Job title.
- Company name.
- Email address.
- Phone number.

This information is the basics you need to build out your sales cadence in the following framework.

HINT:

Start Small & Work Your Way Up

It can be tempting to build out a larger audience and attempt to scale your audience fast.

After all, more data means better insights and bigger results, right?

Nope.

The reality is that at this stage, it's better to keep your test audience sizes lower. And only later should you expand.

Here's why.

- **It's More Efficient** – Running sales cadences takes time. The personalization, the follow up, the results tracking—it can all add up to a good chunk of effort, especially when you multiply it over hundreds of prospects.

The point of testing your audience is to see if that specific list of variables adds up to an ICP who is willing and able to purchase your product. If the ICP doesn't buy from you there is no point trying to get in front of more people similar to them.

- **It Eats Up Less of the Buyer Pool** – Even a single bad experience can turn a buyer off of your brand for years to come.

When you're first testing your sales cadence on an ICP, it's important to keep your test audience small so you don't taint relationships with more buyers than necessary. That way you'll have more prospects to sell to later once you've refined your processes and messaging.



02. Test Your Audience

Okay so you've got your ICP. You've plugged the details into Sales Navigator and built out your buyer list.

Now it's time to move on to testing.

This is where the rubber meets the road. You're going to start running your sales cadence against the audience.

You will learn how to create a cadence and how to implement all the steps of it in the next section of the book.

Nothing too technical once your cadence is built out—start from the top and work your way down the list.

The goal is to get through the list and see how successful you were at achieving your

desired outcome (booked a discovery call, scheduled a demo, closed a sale, etc.).

Then we can determine whether to scale our efforts or change the ICP. Make sure to document your results so that you can make a decision in the next step of the framework as to if this process has been a success.



03. Scale or Change

After you've run through your buyer list and recorded your success rate, it's time to take a step back and evaluate.

If the success rate (e.g., meetings booked vs. your audience size) was less than 5%, then there's an issue with either your ICP or the cadence.

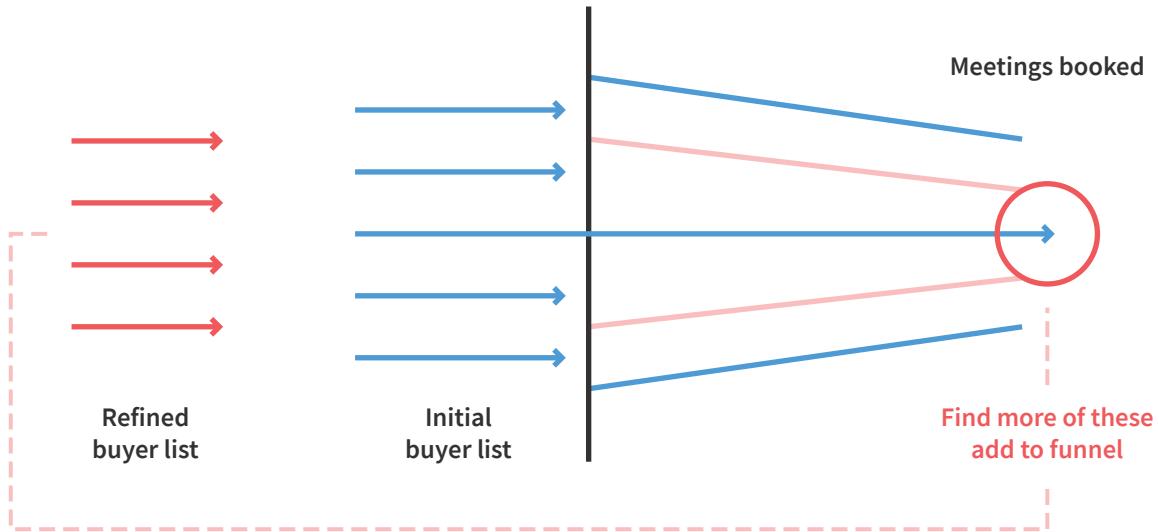
For example, if you run 50 people through your cadence, you would need to book more than 2-3 meetings for it to count as a success.

If you're hitting less than 5% then you need to identify whether your ICP or your cadence is at fault and then try again.

This step takes a bit of work and critical thinking on your part.

But believe me, **it's well worth the effort**. It's not uncommon to go from a 5% meeting rate to 10-20% after a single round of ICP change.

The first thing to look at is did anyone in the buyer list book a meeting? Then you can look at what the people who booked a meeting have in common and refine your ICP to closer match their characteristics.



If you didn't book anything, then your initial hypothesis was incorrect and it's back to the drawing board to create a new ICP that is more likely to end up your calendar.

⭐ **HINT:**

Refine the List

Your ICP isn't static. It can always be improved.

For example, let's say you have a 20% success rate. And running through a list of 100 prospects takes about a week. By Friday you'll have 20 new meetings booked into your calendar.

But if you refined your ICP to earn a 40% success rate, you could book the same number of meetings, **in half the time**.

So no matter where your success rate is right now, there's *always* going to be value in refining your list and iterating on your success.

☆ HINT:

Multi-threading

Depending on the size and complexity of the sale you're trying to win, there might be multiple ICP's within the account that you need to engage with.

The bigger the deal, the more people will be involved and the higher up the corporate ladder you will have to go to get it done. For example when selling Salesman.com Academy to corporates:

- **1-30 seats** - Generally the VP of sales will have the budget and authority to pay the invoice and get the team onboarded.
- **30+ seats** - At this point people from finance, procurement and HR start getting involved even though the VP sales is still the final decision maker.

Even though the VP of sales is my *major* ICP, I still have to understand the *minor* ICPs and the value I add to them if I'm going to win larger deals.

That's why for larger, key-accounts it can be valuable to "map" the account before you add buyers to your cadence. This allows you to get your message across within the account from multiple angles.

Connecting with multiple ICPs within the same account is called "multi-threading". It creates an additional dimension to your prospecting efforts. We cover this further in the Sales Cadence Framework.

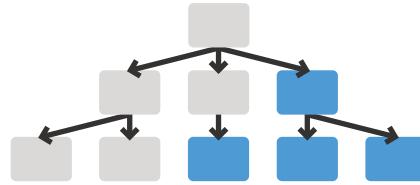
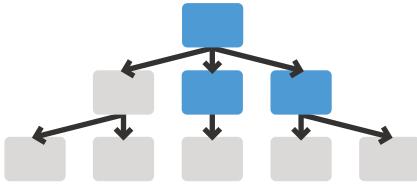
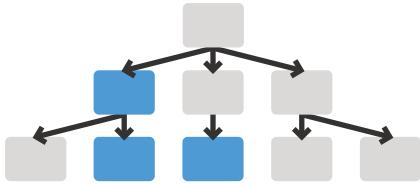
Who to Map?

There are three main strategies for mapping your buyers accounts to implement a multi-threaded prospecting approach:

1. Sniper.
2. Top Down.
3. Bottom Up.

Don't overdo the multi-threading of accounts.

You'll book more meetings and make more money adding one person per account to a solid sales cadence rather than procrastinating, mapping out every single account on your territory and then not getting around to doing any outreach.



Multi-thread 1: Sniper

The sniper approach to multi-threading your prospecting within an account works when you know the account well or you've sold to businesses similar to the new account previously.

That gives you the intel to cut straight to the people with power and the individuals that you'll be able to add the most value to by implementing your product.

Multi-thread 2: Top Down

If your product helps the business at a very high level then you should take the top down approach to your multi-threaded prospecting.

This approach can be super effective as you're going right to the people who have the budget and authority to make deals happen.

Multi-thread 3: Bottom Up

If your product helps end users become better at their jobs, then a bottom up prospecting approach works best.

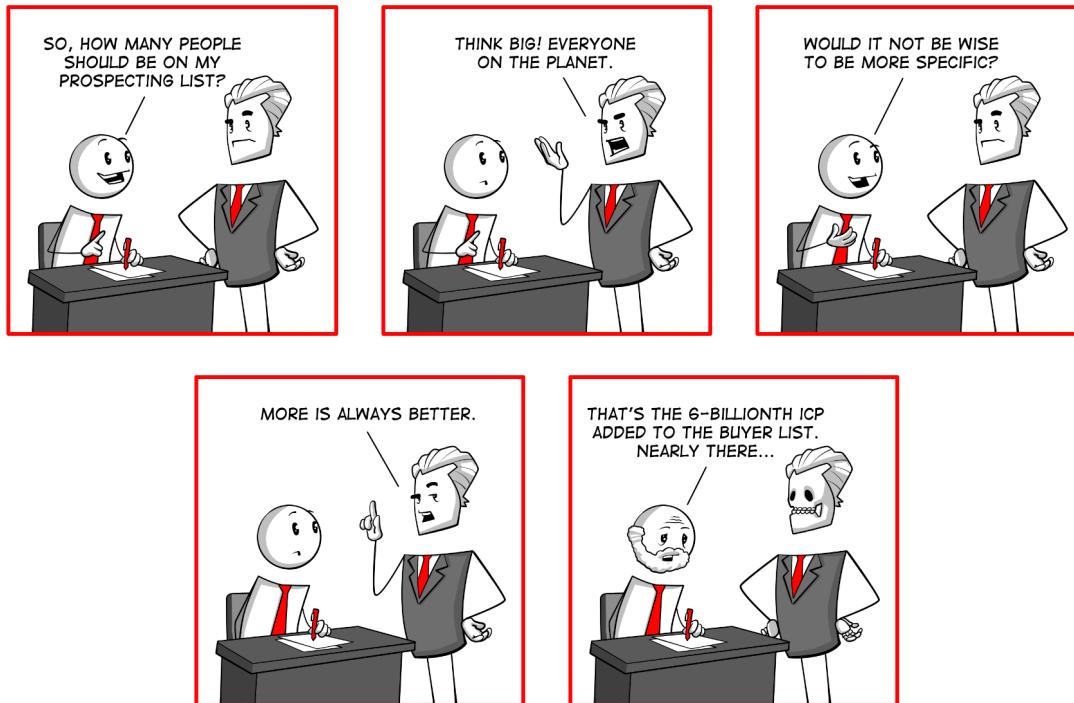
This might seem counter-intuitive to engage with minor ICPs that don't have authority to make a purchasing decision but it can work well because they can become your Champions within the account (you'll learn more about Champions in the Diagnosis Framework).

“

Data is only as good as how you’re going to use it. And so, if you’re not using the data, well, shame on you. But if you’re using the data, and it’s not helping you to improve, well, then shame on you again.”

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Mario Martinez, CEO & Founder of Vangresso,
Salesman.com Podcast.



Wrapping Up

A repeatable process to build accurate buyer lists is a tremendous competitive advantage for a seller. When you build out your meeting booking machine in the next section, all you have to do then is feed the machine each month with a new list to beat the pipeline issues that plague so many sellers.

When you work from a buyer list instead of finding leads haphazardly, you can:

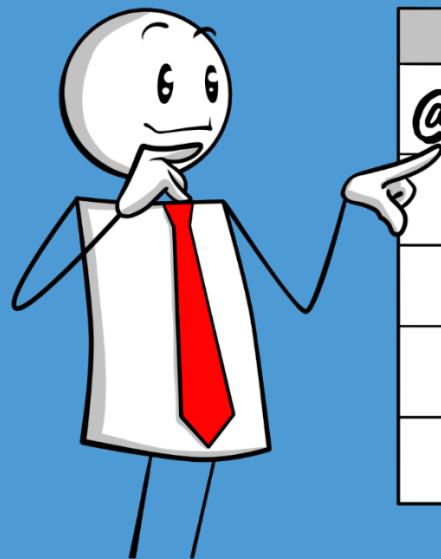
- Focus your energy on prospects that are more likely to close.

- Get clarity on your next sales process.
- Speed up your prospecting.
- Refine and scale your success over time.



Get in Front of the Buyer

05. Sales Cadence Design



CALENDAR						
01	02	03	04	05	06	07
08 @	09	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

Sales Cadence Design

If you don't have a process to solve a problem, it will take forever to solve it.

It's the same with your cold sales outreach. When you have a step-by-step cadence in place, you can contact more people, more effectively in less time.

Sam contacts his prospects when his gut tells him to. Sometimes he connects with the right person at the right time, but his success rate relies on luck.



Walter follows the same 14-day sales cadence with each one of his new prospects. This way, he can improve his process over time.

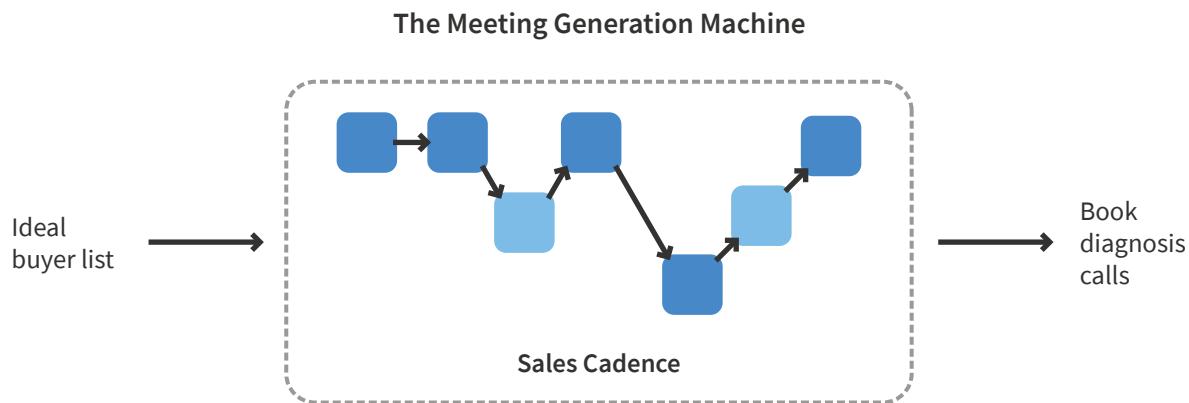


For example, if an email on day two isn't working, he can remove this step or replace it with a different contact point.

Sam has little control over the number of meetings he books each week. Walter can tell you precisely how many meetings he will have in the calendar.

This chapter explains how to contact prospects and book meetings systematically without relying on guesswork or luck.





Building the Meeting Booking Machine

You can't expect to contact a buyer once and get a reply.

If you're dealing with B2B buyers that have the influence and budget to purchase your product then they're likely busy people.

But making notes, setting reminders and using your gut feeling to prompt you to reach out to people isn't very effective either. You run the risk of massive decision fatigue before you've even connected with a buyer on the phone.

That is why you must create a sales meeting generation machine. A system where you put in X leads at the beginning of the month and generate Y sales meetings out the other end. This is otherwise known as a sales cadence.

What Is a Sales Cadence?

A sales cadence is a documented, formalized, sequence of communications or “touches” that sellers follow to develop relationships with buyers.

The cadence consists of various outreach methods (email, phone, social media, etc.) and spans several days, weeks, or even months.

Think of a sales cadence like a cold outreach roadmap. A strategic sales cadence tells you *when* to reach out to leads and *how* to communicate with them. With it, there's no more asking, “Should I follow up today or tomorrow?” And there's no more wondering which communication method to use. Like so many other aspects of sales, there's no single cadence that's a fit for every business or industry.

Bigger deals with a longer sales cycle, for instance, might call for a longer sales cadence. Products with a lower price point may benefit from a more rapid sales cadence.

That's why it's so important to develop and tweak a sales cadence that's right for you and your ICP.

Why Should You Use a Sales Cadence?

Some sellers are under the impression that a sales cadence is only for large teams. And for smaller businesses, sellers should simply “feel” their way through the process of connecting with a buyer.

This couldn’t be further from the truth.

Instead, implementing and following an formal, step-by-step sales cadence brings a variety of benefits:

Simplify

The biggest benefit of following a sales cadence is that you never lose track of where you’re at in the sales process.

Most successfully closed deals require at least eight touches, according to HubSpot. And when you’re playing it by ear with your follow-up messages, it’s easy to forget when you last reached out or what your previous email covered.

With a sales cadence, there’s no question of what to say next or when to say it. It’s a simpler, more efficient way of selling.

Scale Without Spam

The “wing it” approach may work when you only have a handful of buyers. But as business expands and you’re juggling a growing list of potential buyers, wires get crossed and opportunities for developing deals go overlooked. With a well-defined sales cadence, you can handle more buyers, close more deals, and don’t have to worry about overwhelming prospects with too much random communication.

Track & Refine

The first step to building a foolproof sales process is tracking what works and what doesn’t. With a sales cadence, you can observe and analyze which stages you’re losing ground with buyers. And you can refine your process when you recognize new steps that are working well.

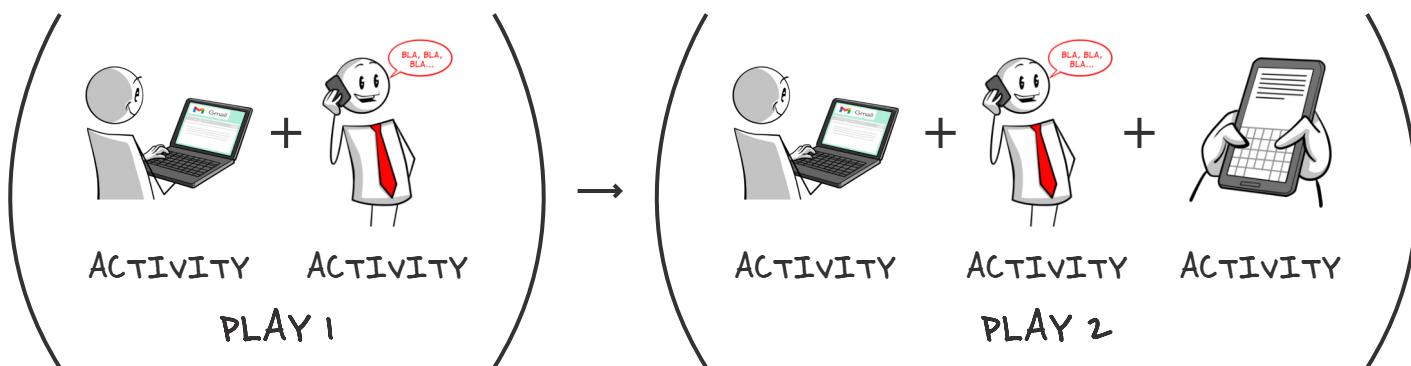
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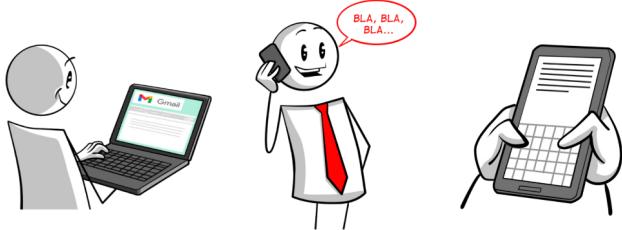
You're selling the meeting, not the product. So you have to believe in the potential value of the meeting for this individual, even in the downside case where you never do business together. So you have to know what's on offer in the meeting. **What are they going to learn? That's the product.** And I think the biggest mistake that most people make is they sell past the meeting.”

Chris Beall, CEO of Connect and Sell,
Salesman.com Podcast.

The Sales Cadence Design Framework

Adopting and following a sales cadence is a great way to streamline your buyer outreach and lock in more wins. But what are the elements that make up a successful sales cadence?





01. Activities

Every sales cadence is made from a combination of outreach activities. These outreach activities are the individual social interactions you can have with a potential buyer. And as with the overall structure of the cadence, the type of activity that resonates with your ICP buyer most will vary.

There are seven different types of activities you can engage in:

1. **Video** – Video messages sent to the buyer through email or via social media.
2. **Social** – Engagement through social media platforms.
3. **Email** – Text-based messages sent to the buyer through email.
4. **Meeting** – In-person meeting with the prospect.
5. **Call** – Both phone calls and video calls are.
6. **Voice-mail** – Voice messages left for your prospects after a no pick-up.
7. **Text** – SMS messages delivered to your buyer's cellphone.

Remember to vary up your outreach activities. Not all buyers will respond to the same activity, the same way. For example, an older executive from a more traditional company may gravitate to doing business over phone calls. A younger buyer from a startup may be more receptive to text messages.

In the end, your outreach depends on your buyers preferences. And refining which activities you use over time is essential for creating a successful sales cadence.



02. Plays

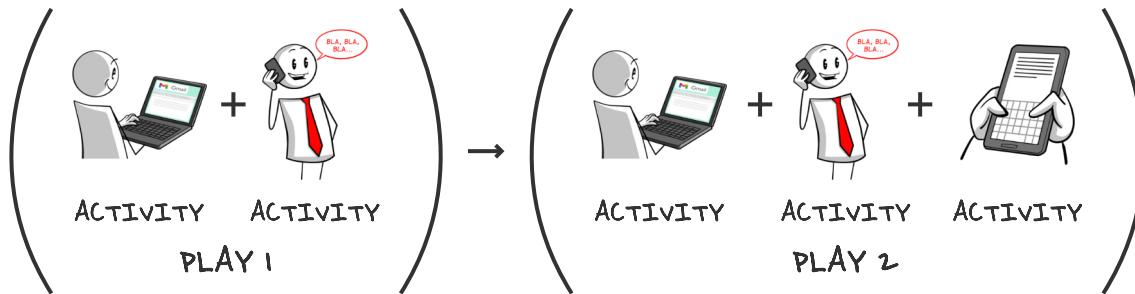
Plays are a series of activities that are grouped together and completed one-after-another in quick succession. For example, a play might look like this:

Call > Voicemail > Email and mention the call

Think of a play as an activity combo. A one, two punch that can often get more attention than a single contact point (with out much more effort).

When the activities complement and build on each other, a play is going to be more effective at driving action.

We'll talk more about plays shortly.



03. Cadences

Similar to how plays are a series of activities strung together, a cadence as a whole is a series of plays completed over days or weeks.

It's critical to understand that cadences have an effect that's greater than the sum of its parts. It's the sequence that leads to results, not just the individual pieces.

For example, a prospective buyer will have more trust and rapport for you and your business at the end of the cadence than at the beginning. And many times, an activity needs a certain amount of established trust before it becomes effective at generating meetings.

The Goal

A lot of sellers misunderstand the end goal of an outreach sales cadence.

A sales cadence is not meant to bring buyers to the end of the sales cycle and close the deal. Instead, sales cadences are designed to get you a meeting to have a diagnosis call (which you'll learn how to do in the final section of the book) with your buyers.

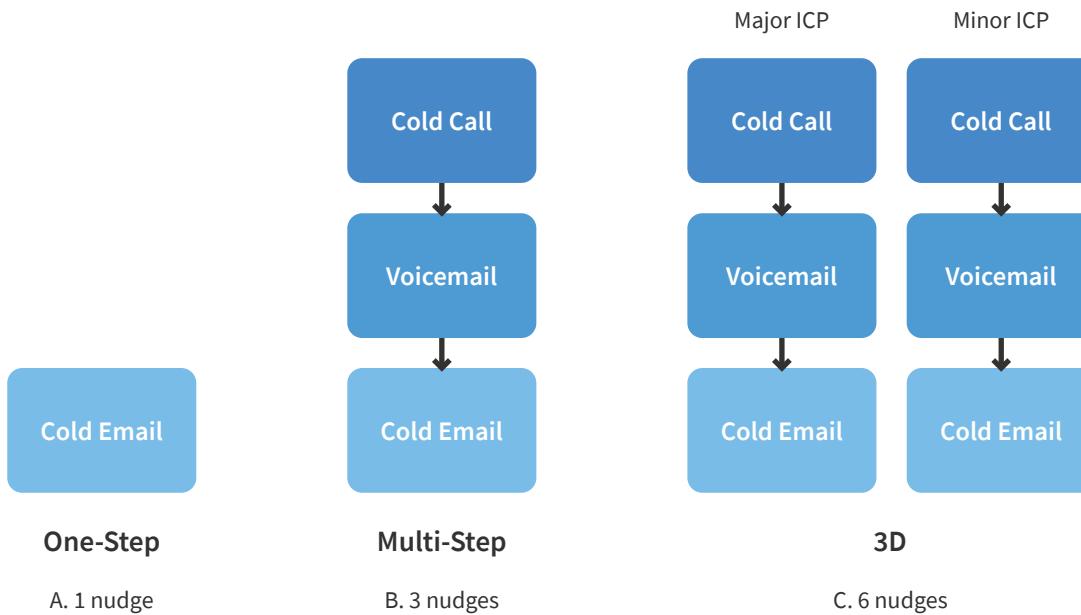
So remember to communicate the value of

the meeting during your first few interactions, not just the value of the product. You can do that by promising industry insights and showing them gaps in their business processes.

An outreach sales cadence is just the foot in the door. But it's the foot in the door you need to start nudging your buyer to a "yes" decision.

The Three Plays

There are three types of plays you need to build a successful cold outreach sales cadence; One-Step Plays, Multi-Step Plays and 3D Plays.



A. One-Step Plays

One-step plays are single activities of any type—phone calls, emails, text messages, or any other kind.

One-Step Plays are key for long-term accounts with a particularly lengthy sales cycle. These are the buyers that take time to consider using your product. And this type of play prevents these more sensitive buyers from feeling overwhelmed or put off by the intensity of your communication.

B. Multi-Step Plays

Multi-step plays drive more action, attention, and responses from buyers over a shorter period of time. That being said, a Multi-Step Play isn't going to be right for every type of buyer. So don't assume going this route is always the best option.

You can of course build your own Multi-Step Plays. But for now, you can use the three plays as a basis for building your first successful sales cadence.

Loop Back

Call > Wait 5-minutes > Call > Voicemail > Email referencing the voicemail

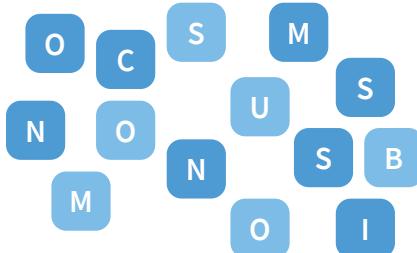
Social

LinkedIn visit > Call > Voicemail referencing LinkedIn visit

Content Share

Call > Voicemail to explain that you'll send an email > Email content and refer back to your call

Single Plays



3D Plays

Commission Bonus

3D plays add up to more than the sum of their individual parts

C. 3D Plays

A 3D Play is when we take a “multi-threaded” approach to prospecting within an account.

If we engage multiple people within the account, at the same time, with a message

that benefits each one of them personally, the effect becomes bigger than the sum of its parts.

Your buyers will communicate between themselves, they will invite each other to meetings and they will share any videos or marketing materials that you’ve sent them, across the account.

The goal is to create a “buying group”.

Buying groups, who are all wanting the same thing and moving in the same direction become much more powerful change agents than a single individual within an account.

66

I fundamentally believe that business is long-term, **and business is about relationships**. Sometimes that person who is more aggressive in your face and who's going to twist arms and close deals, they might have short-term success. But, if we think about it long term, then there's other approaches that may be more appropriate depending on the sales cycle that you're working with."

Ty Bennett, Author, Speaker, & Founder of Leadership Inc.,
Salesman.com Podcast.

Sales Cadence Fundamentals

Your sales cadence will vary from the ones we use to close large sales teams at Salesman.com. Your cadence should be different than your competitors and maybe even from other people on your team.

But there are a few fundamental elements that all effective sales cadences tend to have.

Some of these recommendations are somewhat anecdotal from the thousands of group coaching calls we've run over the past 5 years inside Salesman.com Academy. Others have been tested and fully vetted by our team and the high performers in the training program.

Length

Minimum of 2-3 weeks. Less than a week and you might miss buyers because they were on holiday or head down in the middle of a big project. More than 3 weeks and the buyer clearly hasn't been moved by your value proposition.

Activities

Use as many different activities as possible. You can share the same message over many platforms and mediums. Some buyers will respond to some mediums, others to alternative content types. Hit them from all angles.

Touches

More than 10. Once you get to 14+ touches without a response, the buyer is telling you that they don't care. Move onto someone who might be an easier close.

Personalization

The first cold email must be personalized. For the messages, personalization matters less. Throw random personalized emails in the mix to break the pattern of more generic outreach.

Content

Each touch point should cover a new “angle” on the hypothesis of value that you have for your buyer. For example rather than sending a cold email that shares how Salesman.com Academy helps salespeople with frameworks and group coaching, each of these points should be split into separate messages.

Message

Get creative. Images, case studies, one liners that look like a SMS message, videos, break up emails etc. The more variety to you use, the more pattern interruption you’ll create verses the other sellers hitting your ICP buyers inbox.

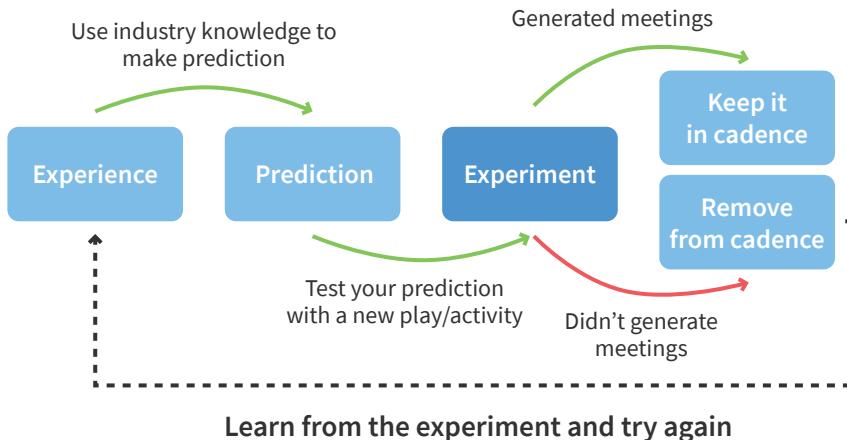
The Account

Are there multiple decision makers within the account? Target them all. Multi-threading your outreach can be deadly effective.

“I Don’t Give a Shit”

For every email, video, call, social connection ask yourself “does the buyer really give a shit?”. If they don’t care, don’t send it. No excuses.

Finally, before I share some example cadences I have to explain something incredibly important. This next step is what separates the sellers who have random, lucky success and those who can engineer massive sales success each and every quarter...



The Scientific Method

Remember back in school when you learned about something called the scientific method? Well pull on your short shorts and grab your Teenage Mutant Ninja Turtles lunchbox because the scientific method is *vital* for building great cadences.

The scientific method is the most widely recognized way of building empirical knowledge. It's a system of observation, measurement, experimentation, and theory development.

The process involves:

- Stating a hypothesis (a guess about

why something happens or why an event occurs).

- Testing that hypothesis in the real world.
- Refining your hypothesis using the results.

Okay, so how does this all apply to sales cadences?

Well, it turns out that creating and refining your cadences for maximum success downright requires using the scientific method.

You may land on a perfect combination of plays right out of the gate. Or you could find that a certain set of activities is actually

causing potential buyers to drop out of your cycle. The key is to *keep on testing and refining* your sales cadence until it delivers you predictable meeting booking effects.

The example sales cadences are a solid foundation to build on. But the work still falls to you to tweak and refine them so they align with your ICP. And if there is a play that's not performing for you (no calls, low email open rate, zero meetings booked, etc.), then it's up to you to remove it from your cadence or try something different.

That being said, here are the sales cadence that we've tested and seen great results from.

Starter Sales Cadences

**Note: The plays in the sales cadence frameworks below are labeled as “OS” for One-Step Plays and “MS” for Multi-Step Plays.*

Often the enemy to getting started is overwhelm. That’s why I’ve included a few “starter cadences” in the book. If you’re struggling to think out your own cadence and your procrastinating on getting started, then copy one of these cadences and start building some momentum with it.

Once you have ran 50-250 prospects through your starter cadence, you can then see if the hypotheses that you made about your value proposition and your ICP was correct or not.

I promise that if you’re strict with your changes and document your process, by the second or third run-through you’ll have a sales cadence that delivers predictable results.

A. Education Cadence

This sales cadence is perfect for buyers that don't yet understand how your product will add value to their lives. It focuses heavily on providing educational resources that your buyer can use to learn more about what you're offering.

- ✓ **Day 1** – OS: Connect on LinkedIn
- ✓ **Day 3** – OS: Email – Case study for a related business using your product
- ✓ **Day 10** – OS: Email – Link to a “how-to” blog post that focuses on a common problem in their industry and how your product can help solve it
- ✓ **Day 12** – MS: Call > Voicemail to explain that you'll send an email > Email link to another case study and reference your call in the email
- ✓ **Day 14** – OS: Email – Provide some hard data on the buyer's problem that they might find useful
- ✓ **Day 20** – OS: Email – Straight forward ask for a meeting
- ✓ **Day 25** – MS: Call > Voicemail > Email asking for a meeting

HINT:

Share Your OWN Educational Content

The most important thing for the education cadence is that you add value to the buyer by educating them. So the more educational and valuable the content you share, the better the cadence performs.

This cadence includes plenty of opportunities to pepper in content you've created yourself.

What articles have you written that are getting tons of attention? Which videos are resonating with audiences just like the buyer you're reaching out to? What have you built that they'll love?

When you point to your own branded content, you're not just adding value. You're also subtly building rapport and demonstrating your authority in your industry. You know this stuff! And this is where you prove it!

B. Social Cadence

The social sales cadence is perfect for targeting the social butterflies on your buyer list. It focuses primarily on making a connection through LinkedIn. However, you can also apply it to other social media platforms like Facebook or even Instagram.

- ✓ **Day 1** – MS: Visit LinkedIn profile > Connection request.
- ✓ **Day 3** – OS: Comment on latest post and ask a thoughtful question.
- ✓ **Day 7** – MS: Call > Voicemail to explain that you'll send an email > Email link to a relevant blog post and reference your call in the email.
- ✓ **Day 14** – OS: Email – Straight forward ask for a meeting.

C. Stone Cold Cadence

This sales cadence is great for separating yourself from the noise of the market. It works best when the buyer is already familiar with your brand and your product. But rather than understanding the value you offer, they think of you instead as a commodity. The goal is to reposition yourself as an asset.

- ✓ **Day 1** – MS: Call > Wait 5 minutes > Call > Voicemail > Email referencing the voicemail.
- ✓ **Day 3** – MS: Call > Wait 5 minutes > Call > Voicemail > Email referencing the voicemail.
- ✓ **Day 4-10** – OS: Email – Each day send them a new “insight” about their industry, their business, or your product.
- ✓ **Day 16** – MS: Call > Wait 5 minutes > Call > Voicemail > Email referencing the voicemail.

HINT:

Generic Insights Won't Do Nothing

Skip the generic content.

Personalization is key in the stone cold cadence. What is the exact industry they're in? What are some little-known trends happening that will directly impact them?

Insights don't mean talking about overlooked features of your product. They don't mean sharing stats on your success rate or how much your service boosts productivity.

Buyers want to hear about their world, not yours.

Put in the work to find insights that are buyer-focused, not product-focused.

Sales Cadence Tools

Building a strategic sales cadence is crucial to fill your pipeline with enthusiastic buyers. But to really get the most out of your cadence, you're going to want to utilize software to do some of the heavy lifting (and boring tasks) to keep your cadence flowing.

I haven't included any specific software recommendations in the book as the tools I recommend do change from time to time. But here is an overview of the category of tools that you should consider investing in.

Email scheduler

Rather than type every email in a sequence manually, every-single-time, it's useful to have a tool to schedule your emails. The tool should allow you to upload a spreadsheet of names, emails and personalized first lines and then automatically send your emails across your cadence, over predefined days.

CRM

A customer relationship management tool (CRM) will help you keep track of your buyers, the conversations that you're having with them and it will allow you to automatically create reminders or to-do lists for each day based on your programmed sales cadence activities.

Spreadsheet

Unfortunately I've not come across any tool quite yet that accurately tracks all types of touch points, across all channels. You need to track this data so that you can make informed decisions on what is working well and what touch points can be eliminated. A simple spreadsheet can manage the job just fine.

Call Confirmation Cadence

Once you've developed an outreach cadence that works, there's one more step that you'll need to implement if you want people to actually show up to the meetings that have been booked.

I call this the call confirmation cadence and it stacks on the end of the conversations that you've had with a buyer when they've agreed to meet with you and discuss things further.

This may look like a lot of extra work. After all, who wants to send two extra emails or touches before you jump on a call with the buyer? Aren't they going to show anyway? But this cadence will save you time by weeding out the no-shows before they ghost you and leave gaping holes in your calendar.

A. The 24-Hour Reminder Email

This email should include a brief agenda for the meeting while also linking to any relevant content or data the buyer may want on-hand during the conversation.

Example:

We're looking forward to connecting with you tomorrow at 8 am GMT. Here is what we have agreed to discuss on our call -

- *Point A.*
- *Point B.*
- *Point C.*

We also recently published a report that backs up some of the data points we're going to look at. Here's a link if you'd like to have it on hand -

[LINK]

If anything comes up in the meantime, please do not hesitate to let me know. I'm always here to help.

B. The 10 Min. Courtesy Touch

Always default to a quick text if you have the buyers mobile number. Otherwise drop them a one line email instead.

Example:

Looking forward to our call in 10 minutes. I will call you on xxx-xxx-xxx-xxx. If anything comes up in the meantime, here's my mobile number too xxx-xxx-xxx-xxx.

When to Break the Cadence

The sales cadence runs until you get a response from the buyer. That can be a meeting booked or a hard “no” on a cold call, a conversation back and forth over LinkedIn or an email response for example.

Remember: *The only goal of the sales cadence is to book the diagnosis call.*

If you get to the end of the sales cadence and the buyer still hasn’t responded then you should send them a break-up email (I share how to create these in the next chapter) and either drop them or add them to a “nurture” email list (email them occasionally when there are big product or industry shifts that they should now about).

Trigger Events

If you have a slow week of meetings, you may want to drum up additional bookings to cover the gaps in your calendar. The best way to do this is to lean into “trigger events”.

Trigger events are specific moments in your buyers lives that are prompted from the activity in your sales cadence or other environmental factors that you can monitor.

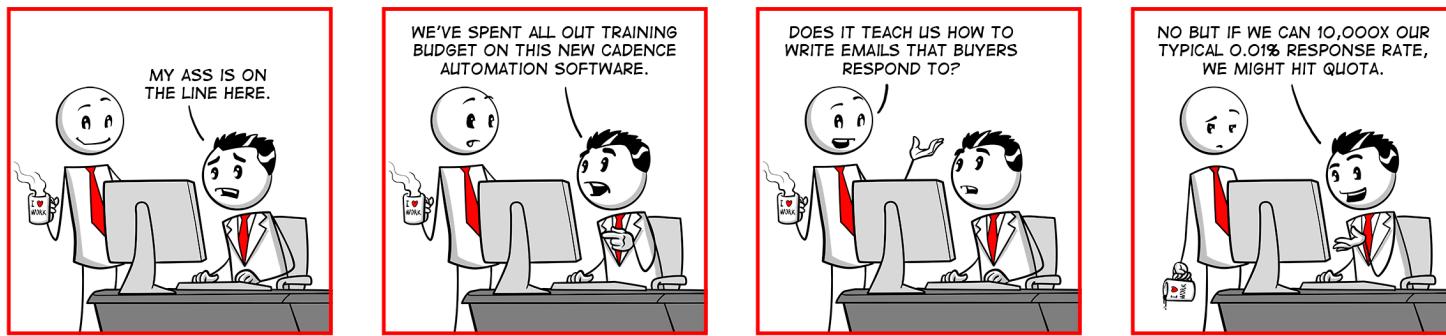
When you notice any of the following trigger events it’s well worth doing a multi-step play of call>email (be honest and mention the trigger event so it’s not weird...) to the buyer:

- LinkedIn connection request accepted.

- Email in sales cadence opened a bunch of times rapidly.
- Company, industry or product new launched in media.
- Buyer gets a promotion
- Comment on a LinkedIn/social media post about your product.
- Buyer’s direct competitor makes a big announcement.

So the only time when you break from the formal cadence is when:

- Diagnosis call booked.
- Hard “no” from the prospect.
- Trigger event.



Wrapping Up

Some sellers may be a bit hesitant about changing up their process. They argue that selling is more *art* than *science*.

But a sales cadence isn't so much a path you should never veer from. Instead, it's a foundation for you to build on again and again.

The more you refine and tweak it for your ICP, the more successful it's going to be. And the

greater impact it'll have on your meeting booking rates.

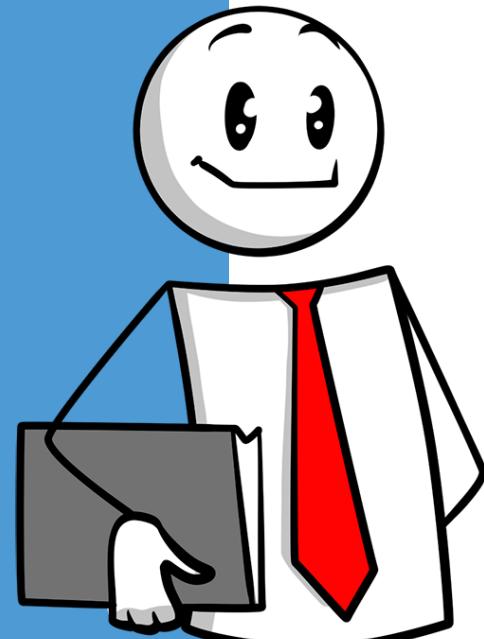
In the end, Daniel Disney (speaker/trainer) put it best on an episode of the Salesman.com Podcast:

"I've worked and managed a lot of salespeople that are very resistant to utilizing things like cadences because they think they can do it themselves. They think

they know everything. And trust me, for most people, having a bit of structure can have a hugely positive impact on your results."

Ob.

Cold Email

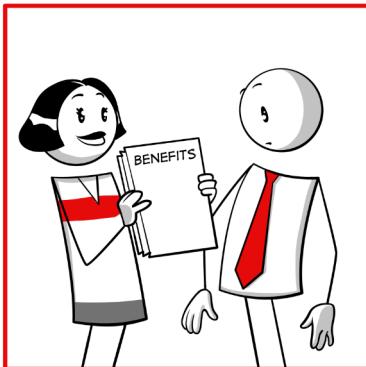


Cold Email

If speaking with you is the logical thing to do, most people will book a meeting.

So you should leverage a cold email framework that makes it entirely logical for your buyer to book a meeting with you.

Mary provided Sam product benefits to include in his cold outreach. Mary claims that the benefits work great on billboards to create brand awareness and so should work in cold emails too.



Sam wasn't getting any replies, so he turned to Walter for help.



In Walters's emails, he shared the problem he thought his buyers had had and asked if they'd like it fixed. His reply rate was much higher than Sam's.

Sam shifted to solving buyers' problems logically rather than regurgitating marketing material in his cold emails and started booking more meetings.

This chapter explains how to send an email so targeted, that the person receiving it feels guilty if they don't book a meeting.



Cold Email Framework

Few tools are as essential to B2B sales success as email.

Sure, in the old days all you'd need is a phone, a stocked Rolodex, and 6 cups of coffee to be closing sales left and right. But today, business is done over email. And when you do it *right*, emails are the absolute most efficient way to turn cold strangers into hot leads.

So what happens when your cold emails aren't getting the response rates you're looking for? Do you just send out more of the same? Spamming the market and hoping the numbers play out?

Or do you switch things up? And how do you use a strategic, targeted approach to creating cold emails that *actually work*?

This framework focuses on the latter (and far *better*) solution.

You'll learn how cold email has changed and the proven four-step framework to have cold email success.

Cold Email Stats

Before we jump into the specifics, let's take a look at a few statistics on cold email:

- People spend an average of 2.5 hours each day checking emails (Adobe).
- The return on investment (ROI) of email is an unheard of 38 to 1 (Litmus).
- The generally accepted measure for email success is an open rate of 15%-25% (Campaign Monitor).
- Email is the primary customer acquisition channel for 81% of small to medium businesses (SMBs). And 4 out of 5 SMBs use primarily email for customer retention (Emarsys).

It's clear emails work for sellers but what is the difference between a sales email and the general spam that we're all inundated by?

Are Cold Emails Spam?

In sales there are two types of cold emails: *strategic* cold emails and *spammy* cold emails.

We've all seen the spammy cold emails before. They...

- Contain overly generic messaging (zero personalization).
- Have nothing to do with you or your business (lack any relevancy).
- Seem poorly written with little thought put into it (indicating a lack of effort).
- Offer no value.

We're not covering how to spam a market with this framework.

Instead, we'll be focusing on strategic cold outreach—the kind that relies on research, due diligence, and ultimately, effort to get results.

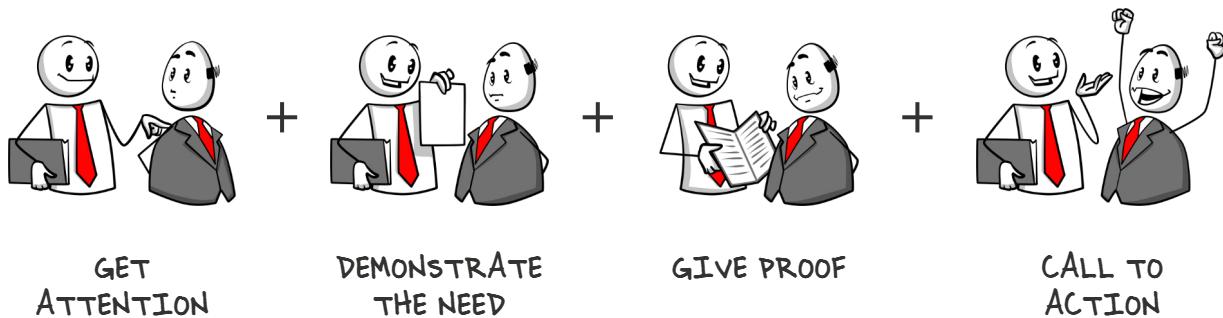
Why? Because creating personalized, valuable emails at the front end of your sales cadence will never be disrupted by A.I., automation tools or rooms of chimps tapping away at keyboards. It will always be an effective way to communicate with buyers.

The Cold Email Framework

Spam sucks. And bad emails don't get opened. That much is clear.

But how do you get great open rates from your cold emails? How do you develop effective, strategic sales outreaches that drive real engagement? And how do you steer clear from coming off spammy?

That's exactly what The Cold Email Framework is all about. This easy-to-implement cold email process is built on four essential steps:





01. Get Attention

The most important step of any cold email outreach campaign is to first get your buyer's attention. But there's a right way and a wrong way to do this.

You can get your market's attention through gimmicks. Stupid things. *Extreme* things. These can grab the eye of your buyer. But this tactic comes with the trade-off of reducing

confidence in your abilities as a solution provider (no one wants to buy from a clown).

Your goal is to grab attention while still remaining professional. This, of course, takes a bit more tact to pull off correctly. But when done correctly, it accomplishes the dual effect of building both intrigue and trust.

Luckily for us we have two opportunities to grab the buyers attention; the subject line and the first line of the email itself.

“

There's an old rule I think in newspaper headline writing that you spend about 50% of your time writing the article and about 50% crafting the headline, because if nobody reads the article, **it wasn't worth writing.**”

99

Ian Brodie, Trainer, Author, & Consultant,
Salesman.com Podcast.

The Subject Line

According to Marketo, the most effective cold email subject line length is seven words long—just seven!

So, how do you get attention with such a short subject line? Try this:

A. Self interest

Appealing to the buyer's self-interest is a surefire way of avoiding the delete button. Try to appeal to what matters to them deep down, like Crest (toothpaste):

“Give your kids a fighting chance.”

In the B2B space, most of your buyers are looking for ways to improve their work performance. They want more recognition, promotions and of course to get paid better. That's why using the following words in your subject line work great to spark a buyers self interest:

- New.
- Discover.
- Introducing.
- Announcing.
- Now.
- At last.
- Just arrived.

Starbucks shows how this approach could look like in a subject line:

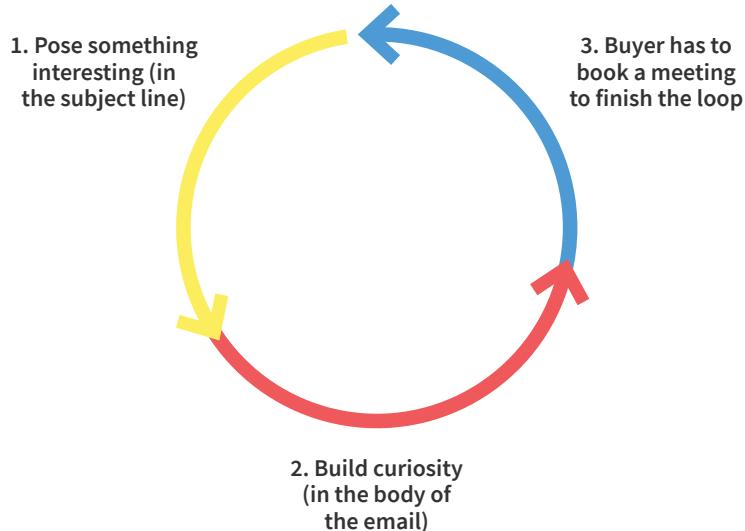
“Discover our new dark roast taste.”

B. Qualify the Audience

Though short, your subject line goes a long way towards selecting the *right* audience for what you're selling. Lead qualification can be a huge time drain if done incorrectly. And with the right subject line, you can weed out the right buyers from the wrong ones before the meeting is even booked.

Take the following examples.

- *“Is your electricity bill too high?”* – We're clearly looking for customers with lower incomes since anyone with any substantial wealth has no idea how much they're paying each month in electricity bills.
- *“Executive briefing for seven-figure entrepreneurs”* – This narrows down the people that will open the email to business owners turning over more than \$1 million.



C. Open a Curiosity Loop

Last but not least, try to draw the reader in by opening a curiosity loop in the subject line. Hint at the curious fact in the email and then nudge the buyer to book a meeting to completely understand it.

“How to” and “What if” subject lines are great for this, especially when they play to the biggest pain points your buyer faces.

- “How to avoid firing people in 6 easy steps.”
- “What if you hit quota every time?”

We’ll cover delivering the “build curiosity” part of the curiosity loop in a minute.

 **HINT:**
The Best Headlines

The Salesman.com team is sends between 500-1000 emails a day. Here are our top performing headlines (steal them if you can build an email around the subject line that makes sense):

- **72% open rate:**
“[NAME] - Winning?”
- **83% open rate:**
“[NAME] - Quick question?”
- **65% open rate:**
“I was born to work with [BRAND].”

“

If you are sick of being rejected, if you’re sick of people ghosting you, if you’re sick of people not replying to your messages, **improve your qualification at the top of the sales process**, and you’ll eliminate a lot of that at the far end of it.”

Daniel Disney, King of Social Selling,
Salesman.com Podcast.

Personalized First Line

Personalizing the first line to your cold email is key to grabbing and keeping the attention of your buyers. Marketing tools are becoming sophisticated enough to somewhat personalize the first line. And you're in competition with all the marketing spammers out there.

That means to break through with your sales message, you need to make it clear that some thought has gone into your introduction.

Personalizing the first line in our testing is the difference between a 5% reply rate and a 30% reply rate.

The quickest way to personalize the first line is to stroke the prospect's ego. This can be done in a number of ways -

- **Product release** - “FEATURE looks awesome. I can't wait to try it.”
- **Growth** - “I noticed you just hired X. Confidence must be high right now.”
- **Content** - “I just read through X post. I liked Y that you discussed.”
- **Case studies** - “I just saw your case study with BRAND. The campaign looks amazing.”

Your personalized first line shouldn't take more than 30-60 seconds of time to research and create. The more knowledge of your industry, the players within it and changing market conditions that you have, the quicker you'll be able to script these one liners.

Think of the subject line and the personalized first line of the email being linked. The subject line opens a circle of curiosity, the personalized first line makes it clear that the content has been created for the specific buyer you're emailing which raises the level of curiosity further.

We can then release this pressure at the end of the email with a call to action for the buyer to connect with us to learn more.



02. Demonstrate the Need

Once we have the buyers attention we now need to demonstrate that we understand their problems.

A crazy person, running around naked, screaming “will you be my rubber ducky” will get lots of attention. I wouldn’t want to book a diagnosis call with them though...

So in this step in the email we’re showing that we’re professionals, that we can make a

somewhat accurate hypothesis of the buyers problems and that we might have a way to fix them.

Using the Power of Storytelling

The best way to demonstrate the buyer’s need and show your value is by using the **Reality Gap Method**.

The Reality Gap Method enables you to communicate your value to the buyer by telling a small story about the other buyers you’ve worked with. And in doing so, the prospect starts imagining how you can help them solve their problems.

The Reality Gap Method:

There are three steps to the Reality Gap Method:

1. Acknowledges where the buyer is now (i.e., frustrated with their current software, not hitting sales quotas, etc.).
2. Shows them where they could be (i.e., working 4X more efficiently, consistently exceeding monthly goals, etc.).
3. Provide the generalized steps they need to take to get from where they are now to where they could be (i.e., incorporating this new software into their tech stack, implementing these proven sales frameworks, etc.).

This shouldn't be overly complicated. In fact, the simpler the better in most cases. Here's what it might look like.

Hi [NAME],

I recently worked with [NAME], he suggested I connect with you.

Traditional sales training failed [NAME].

He went from zero motivation, to racing to get to his desk each morning to see how many leads his team was generating.

All we did is was implement a couple of proven frameworks with this team.

Mind if I send over the frameworks we used?

Cheers,
Will

- Current reality.
- Desired future reality.
- Reality bridge.

See how that works?

Nothing clever. Nothing funny. Just an accurate prediction of the current reality of the buyer, their desired future reality, and a bridge to get them from one side to another.

HINT:

Start with a hypothesis of what your buyer's biggest pain points are and go from there. A great was to gather ideas for your cold emails quickly is to survey your current top 10 buyers and ask them the following:

- Why did they do business with you over everyone else in the market?
- Why did they respond to your initial outreach?
- After working with you, what problems did you solve that they didn't know they had prior?

From there, you can deduce the best pain points to test in the market.

Try gathering five angles for each ICP to add to your cadence. Then measure how effective each was at generating discovery calls and sales.

Remember, you're paid for sales, not meetings. A low response rate might look bad, but if it results in more sales in the end, that's the route to take.



03. Give Proof

You've got the attention. You've explained the value. There's just a couple of things missing...

You still have to overcome one of the biggest hurdles to booking meetings with cold outreach—building trust.

How does your buyer know you aren't flat-out lying about what you can offer them? What's to say they aren't putting their career, their professional word, and their company at risk by working with you? After all, only 3% of buyers trust what sellers have to say, according to HubSpot.

And that's where social proof comes into play.

Social Proof:

Social proof is an endorsement from other individuals or organizations confirming the quality of the product you provide.

Some common forms of social proof include:

- Written or video testimonials.
- Online or offline reviews (both comments and star ratings included).
- Credentials and stats about the business (i.e., 1000s of customers served, etc.).

- Awards or certifications.
- Media coverage.
- Celebrity or expert endorsement.

As much as we'd like to think of ourselves as independent and logical thinkers, the opinions of the people around us have a substantial effect on our decision-making process.

When you add social proof into your cold email strategy, you're helping buyers overcome that massive hurdle of, "Is this guy for real?"

Social Proof Stats

Just to drive the point home, here are some statistics on how big of an impact social proof has on your ability to book meetings.

- A whopping **92% of consumers** say they trust nonpaid recommendations more than any other type of advertising. (Nielsen).
- Nearly all consumers (88%) trust user reviews as much as personal recommendations from friends or family. (HubSpot).
- **Seven out of 10** buyers say they'll trust a recommendation from someone they don't even know. **Nine out of 10** (92%) say they'll trust one from a colleague or someone they trust. (Nielsen).

- When sales pages have testimonials on them, it can increase conversions by as much as **34%**. (IMPACT).
- Customers are willing to spend **31%** more with a company that has excellent reviews. (Invesp).

The numbers don't lie. Social proof works. And using it in your cold email is a must.

Building Sales Proof into Your Emails

So the question is, how do you incorporate social proof into your cold email?

First off you can name drop a popular brand you've worked with in the past. A good spot to do that is in the previous step with the Reality Gap Method. A story about how you

helped a random buyer is okay. But a story about how you helped solve a serious problem for the CTO at Nestle or Coca Cola? That's where the magic happens.

Additionally, you should also be taking advantage of the prime real estate at the bottom of your email—the signature. Pop in links to your LinkedIn profile so they can immediately learn more about you and your track record.

But beyond that, you can *also* include a direct link to the testimonial page on your website too. It's just one more opportunity to build serious social proof trust.

STAR HINT:

Make testimonial collection from satisfied clients an automatic part of your process. That way, you can continually gather more social proof that you can use for bringing on more and more clients.

The process doesn't have to be complicated either.

Just send a quick email after you've just completed a successful project or when the buyer is especially happy with the delivery of the product.

It might look something like this:

Subject: *Can you help me out?*

Message:

Hi [NAME],

I have a quick favor to ask.

Could you write a brief testimonial that I can add to my list of satisfied customers?

A few sentences describing your experience with me would be great.

For an idea of what other clients have written, please click here -
[LINK]

Thanks so much [NAME].

At this point in the cold email we've already achieved a lot; We've opened a curiosity loop with the subject line, then build more intrigue and demonstrated that this is a specific email to our specific buyer with the personalized first line, we've shown that we understand the buyers needs and highlighted that we can be trusted.

There's only one step left and that is to get something out of the email in return. It's time to book the meeting.

“

No matter what you send, every email should have **a call to action.**”

Ruth Van Vierzen, Business Growth Expert, Salesman.com Podcast.



04. Call to Action

It's worth pointing out again, that you aren't trying to close a sale with a buyer here. All you're trying to do with your call to action is -

- A. **Best** - Book a meeting to have a diagnosis call.
- B. **Medium** - Get a conversation started.
- C. **Worst** - Disqualify the buyer.

Let's cover the call to actions that we can use for each of these goals and to better understand where they fit within our larger sales cadence.

A. Book the Meeting

Up first and foremost, *ask* for the meeting. Pop the question at the end of your email..

One closing question that works fantastic for this is "Does it make sense to...". You're going to see more of this question as we get into "micro-closing" towards the end of the book.

Your call to action to book the meeting might look like:

- "Does it make sense to jump on a quick call to see if we can help you achieve this too?"

- "Would it make sense to discuss further on a quick call?"

This assertive call to action should feature heavily at the front end of your sales cadence. Why beat around the bush with your buyers if you really can solve a painful problem that they have.

B. Start a Conversation

Sometimes the person you're emailing is never going to book a meeting from a cold email. Remember, our goal is to serve the market and communicate in the way they want to be communicated to.

This is where we switch from a more assertive call to action of booking the meeting directly to a "soft" call to action with the intention of getting the conversation started.

A soft call to action has one goal, get a response from the buyer:

- "Mind if I send more info?"
- "Open to me sending a personalized video to explain"
- "Interested to hear more?"
- "Is this a priority for you right now or not really?"

These call to actions should feature in the middle of your sales cadence.

C. Disqualify the Buyer

A call to action to disqualify the buyer comes at the very end of your sales cadence. This is sometimes called a "break-up email".

A disqualification email is useful for two reasons:

1. It gives the buyer an opportunity to explain that they're not a good fit right so that we can move on or change our approach with the account before pissing them off.
2. It gives buyers who are interested but who haven't bothered to reply a rocket up the ass to book a meeting before we prospect their competitors and help them instead.

Examples of disqualification call to actions include:

- "It doesn't look like we're a good fit. Should I try again in 6-months?"
- "We didn't manage to connect. No worries. If I've got the wrong end of the stick here let me know."

Keep things light. Stay positive in the emails and never blame the buyer for a lack of a response or ghosting you.

You've no idea what's going on in their world right now and so it's always better to keep the door open to working together in the future, rather than be a jerk.

Example Cold Emails

Here are a few examples of emails the Salesman.com team are sending to VP sales and CEO's of medium/large organizations and booking meetings with.

Rather than copying them directly, try and break them down into the different steps of the framework and see if you can rebuild them in your own style, for your own ICPs.

The Strategic Cold Email Framework =

Get attention > Show their need >
Give proof > Call to action

Email 1:

Subject: Referral from [NAME]

Message:

Hi [NAME],

I was chatting with [NAME] last week, and he said I should connect with you.

I was sharing that we help [INDUSTRY] salespeople close more sales in just 28 days, guaranteed!

That is a bold statement, right?

We have helped [COMPANY] increase their sales by [X%] in the past few months.

Would it make sense to jump on a quick call to see if we can do the same for you?

Thanks,
Will

Email 2:

Subject: [NAME] - Congrats!

Message:

Hi [NAME],

I just saw that you hired [NUMBER] of new sales reps over the last quarter - That's exciting!

I reached out because we help B2B salespeople, in the [INDUSTRY] space, find and close more sales in their next 30 days or your money back.

We just helped [COMPANY] win - [CASE STUDY]

I'd love to show you our selling frameworks and my plan to do the same for [PROSPECTS COMPANY].

Would it make sense to jump on a quick call this week to run through this?

Cheers,
Will

Email 3:

Subject: [NAME] - Quick question?

Message:

[NAME] - I saw that you just hired [NUMBER] of new reps. We can help them find and close more sales in the next 30 days.

Mind if I send more info?

Will

☆ **HINT:**

Be Assertive!

Remember that you are a professional. You know the market, you know that you can help your buyer, otherwise you wouldn't have reached out to them. So be assertive.

Assertiveness: The quality of sticking up for one's own rights without disrespecting the rights of others. An assertive seller is confident and self-assured without being aggressive or pompous.

There are many advantages to being assertive in your cold email communication:

- You appear more authoritative (meaning it's easier to build trust).
- Communication is clear (leading to fewer problems later).
- You're more comfortable voicing your good ideas.

☆ **HINT:**

Don't spend too much time on creating email templates—30 minutes for each email should do the trick.

Instead, focus most of your efforts on 1) personalizing the first lines. 2) sending the damn things 3) measuring the results and refining the emails over time.

You're much more likely to happen upon an email that works wonders when you can work off the data. And while it might be tempting to spend hours and hours crafting that "perfect" email, you don't get to choose if it's good or bad, the market does. So get it sent, measure the results and then refine the content until it gets sold results.



Wrapping Up

Cold email is a fickle beast. If you send out lots of valueless emails and spam the market, you're bound to see nothing but crappy response rates and salty replies.

But when you approach cold emailing with a strategic, value-driven framework, you'll be well on your way to creating a sustainable and effective lead generation machine.

07. Cold Calling



Cold Calling

If you don't have attention, nobody will listen.

The same thing happens when cold calling. If you can't interrupt the default pattern of thinking of the prospect when they pick up the phone, they'll never listen to your message.



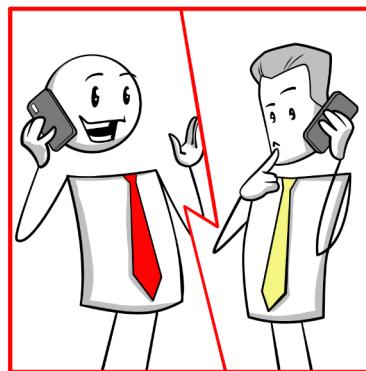
Gerald told Sam to start his cold calls the way he did in the 1980s. He shares that it worked back then, so it should work now.



Sam gets hung up on most of the time.

Walter does the opposite of what most salespeople do on cold calls. This acts as a "pattern interrupt" and gets the buyer to listen to what he has to say.

This chapter explains how to connect with a prospect, knock them out of their mindless attempts to get you off the phone, and then book a meeting within a few minutes.



Cold Calling Framework

Another month's gone by. But even with all the cold emails you've sent, the phone *still* isn't ringing. And now, you're left scrambling to make your quota.

Something's got to change, and you know it.

It's a story all too familiar to sellers. The same ol' tactics just aren't working anymore. And though you've avoided the technique for years, it's finally time for...

Cold calling.

Yes, that dreaded two-word phrase that brings a chill to sellers spines around the world. In fact, the topic came up in my Salesman.com Podcast interview with Jason Bay:

"Cold calling and objection handling are usually the two biggest fears that I hear when we work with sales teams and individual reps."

But cold calling doesn't have to be complicated. It doesn't have to be intimidating. And it doesn't have to leave you feeling like a sleazy, manipulative conman.

This framework shows how to make cold calling your go-to method for prospecting for new meetings.

What Is Cold Calling?

First and foremost, let's settle on a cold calling definition.

What Is Cold Calling?

“Cold calling is the act of reaching out to potential buyers that you have not already interacted with.”

What isn't cold calling?

“Cold calling is not reaching out to contacts you met at trade shows. It is not contacting a lead that expressed interest on your website. And it is not following up with a referral that asked you to get in touch. This is warm calling.”

By its very nature, cold calling has a lower success rate than warm calling. After all, cold call recipients haven't expressed *any* prior interest in what you're selling. Buyers on the other end of warm calls have.

Cold Calling Is Hard—The Stats

For a lot of sellers, cold calling is one of the hardest parts of their job:

- Nearly **half of all B2B** salespeople (48%) are afraid of cold calling (The Harvard Business Review).
- Over **3 out of 5 sellers** (63%) say cold calling is the worst part of their job. (LinkedIn).
- On average it takes **8 cold calling attempts** to reach a prospect with cold calling. (SalesIntel).
- It takes a whopping **18 cold calling attempts** on average to connect with a tech buyer using cold calling. (Gartner).
- **Four out of 10 calls** end in a voicemail, and 90% of first-time voicemails never receive a response. (Ring Lead).

- A mere **37% of prospects** feel like sellers get the information they needed to make a decision to book a follow up call on cold calls. This is especially telling because **75% of salespeople** thought they were spot on with the information they delivered. (HubSpot).

So, with all that fear, anxiety, and difficulty baked into this sales technique, the question is **why do it at all?**

Why Cold Call?

Despite all the stress that sellers have about picking up the phone, cold calling provides a valuable opportunity to bring in new buyers that other sales techniques can't offer.

Here's why:

Quick Connection

Hopping on a call is the best way to make an immediate connection. Email is static. Sure, you're delivering your message. But buyers have time to mull it over, make excuses why not to respond, and forget about it entirely. When you're on the phone, you have direct influence over whether they set up a meeting or not.

Develops Sales Cadence

Cold calling is an integral step to setting up a strategic and effective sales cadence. The best sales cadences use a variety of outreach methods when contacting buyers. The more mediums you use to stay in contact with the buyer, the more you stay top of mind—boosting your chances of meeting.

Adds a Human Element

So much of the sales process these days is handled on the computer screen. And that can make it hard to remember there are real people behind the businesses sending you emails. But with cold calling, you can separate yourself from the pack by adding the human element of a real live breathing person on the phone.

Opens the Door to Chatters

Finally, adding cold calling to your sales technique repertoire brings in a swathe of potential buyers. Buyers that may have otherwise been out of reach. HubSpot reports that 57% of C-level buyers actually prefer to be contacted via phone. And if you aren't cold calling, you could be missing out on an opportunity to book more meetings.

Getting in the Zone

Before you start dialing, you need to get in the right headspace.

Buyers can tell when you're uncomfortable. And they absolutely don't want to waste their precious time chatting with someone who isn't offering any value.

So, how do you get them to stay on the phone?

Well, first you need to get comfortable playing two roles when cold calling: The Entertainer and The Expert.

Role 1: The Entertainer

Your task of rapport building begins the *instant* your prospect picks up the phone. The sooner you can capture their attention, the more likely they'll be to keep on listening.

In fact, Gong found that low-performing salespeople built rapport by around 40% of the way through the call. For top performers, it was around 20% (the earlier the better).

You need to come across as someone the buyer genuinely wants to speak to. Only *then* can you show them how you can add value to their lives.

Bear in mind the entertainer role doesn't mean be a high energy, desperate sales person. Talking slowly, clearly and conversationally is usually the better approach.

Try and eliminate "ums" and "ers". Focus on sounding cool and calm and nudge the buyer to talk 90% of the time by asking questions.

Aim to speak as you would to a colleague at work rather than the stereotype of a late night infomercial host.

★ HINT:

Avoid your tonality going up at the end of each sentence. This makes it sound like you're unsure of the question that you are asking.

If you're confident you can help the buyer, then ask them a questions with a your tonality going down towards the end of it. This helps the question sound more like a statement and your buyer is more likely to agree with you rather than question it.

Role 2: The Expert

While charisma can open up the door, not knowing what you're talking about will slam it shut.

You need to position yourself as an expert—someone who knows what the hell they're talking about. Do you really understand your buyer's industry? Their biggest pain points? Your competition? And, of course, *your product?*

If you don't come across as an expert, the buyer might as well hang up the phone and Google their problem rather than speak to you.

Again though, you want to walk a fine line. Overselling yourself is an instant rapport-killer. Whereas real confidence actually goes a long way.

★ HINT:

Never get emotional on your cold calls.

Think of an expert that you look up to. If you quizzed them on something they were knowledgeable about, how would they answer? Likely with charisma and confidence. Leaving spaces where unsure people would say "errrrr". Smiling as they responded.

They wouldn't bite back emotionally. They wouldn't get flustered.

If they were being shouted at, they wouldn't shout back. They'd let the person who was trying to quiz them release their tension and then respond.

How to Play Both Roles

The problem is cold calling gives you so little time to flex your ability to entertain and demonstrate your deep, deep knowledge of the industry.

To increase your chances of success, think about the following key traits before you pick up the phone for that first each day:

Assertive

You don't wait for things to "just happen." And you're happy to ask appropriate but tough questions. Because you know that that's the only way to get to the heart of the buyers problem and deliver the most value possible.

Extroverted

You don't shy away from a conversation. In fact, you're *energized* by interacting with others. You really do find your buyers interesting. And as a result, you build rapport quickly and maintain contacts for years. You don't have to be extroverted 24/7 (I'm not) but you need to be able to turn on a level of extroversion before you call.

Optimistic

No one likes hearing a pitch from a sad sack. And equally importantly, no buyer believes the product their seller is so unenthusiastic about is going to solve their problems. You also have to exude the optimism that this call is going to be the next winner. The buyer on the other end can sense it if not.

Confident

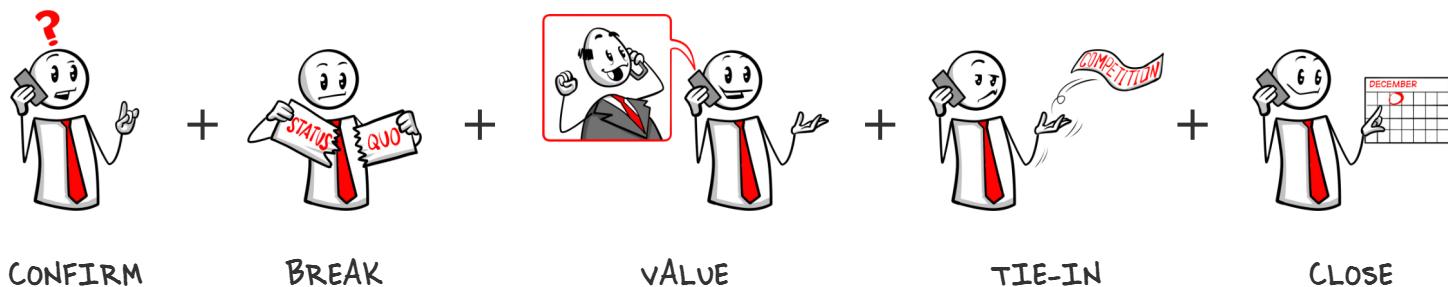
And of course, you need to be confident—in your product, in your company, and in *yourself*. You need to be resilient in the face of rejection (which, let's face it, will happen with cold calling). And you need to know that you're good enough and a "no" isn't personal.

Each of these traits are part of the 15 traits of high performing salespeople. This data comes from over 14,000 sellers completing our SalesCode assessment. You can take it for free and uncover the traits of high performance that you have (and any that you might be missing...) at Salesman.com/Assessment.

The Cold Call Framework

This framework is simple, effective, and adaptable in any situation. Plus, it's short enough to fit into the tiny window of time you have to hook a prospect when cold calling.

Let's take a closer look at what these steps entail, along with some cold calling scripts for each.



“

I think salespeople are so caught up with the word relationship that they're trying to build all this rapport with somebody over the phone or in their quick engagement, they don't realize **they're destroying credibility because they're wasting somebody's time.**”

99

Lance Tyson, President & CEO of Tyson Group,
Salesman.com Podcast.



01. Confirm

The first and maybe most essential step of cold calling success is to **confirm** you're speaking with the right person—the decision maker.

This may be the head of the department, the tech guy, or even the President of Marketing. It depends entirely on your industry and your product.

But whoever it is, it's ideal that you're talking to the person who decides whether or not to buy. Otherwise, you'll be trying to set a

meeting with a gatekeeper who *then* has to go back and sell the meeting to their boss. And your product's true value is bound to be diluted along the way (think of the kids game, Telephone).

So immediately when someone's picked up the call, make sure you're talking to the right person.

Cold Calling Script:

Hi, are you in charge of X?

X – the area of business your product will help the most. We'll use sales for these examples.

A *That's me.*

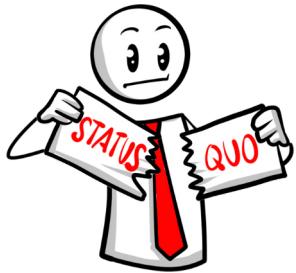
Now you can move on to the next step.

B *That's Barry.*

Now we need to get in touch with Barry.

OK, thanks. Could you connect me with him? Can I tell them that you referred me?

Move to next step with Barry. Make sure not to skip the referral aspect here. Noting a referral creates an instant boost in rapport.



02. Break

Now that you've confirmed you're speaking to the right person, it's time to jump into the specifics.

Ask them how they're currently solving the problem that your product solves. You'll find that most people aren't 100% happy with their current solution. It can always be faster. It can always be cheaper. And it can always be more effective.

Your goal here is to open up the buyer's mind to the potential of a better solution. You're **breaking** them out of the pattern of thinking their current solution can't be changed. After that, you can set the groundwork for your solution being the obvious choice.

Cold Calling Script:

OK great, how are you training your sales reps right now?

We are using [competitor].

Got it. And how is your sales training working for you right now?

A *Not great. We're having a problem with [current problem].*

B *Fine. I think we're all set, thanks.*

★ COLD CALLING TIP:

When you ask how their current solution is doing now, pause and **shut up**. Don't say anything. And lean into the silence. When you do that, you're passing the conversation to the prospect. And that means they'll feel compelled to answer.

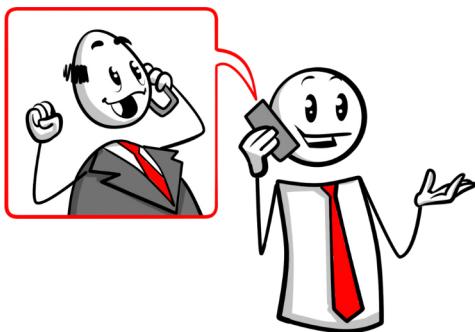
From there, you can either learn that they're looking for a better solution or force them to bring up an objection which you can touch on later.

“

If you’re in B2B, you’ve got
to talk in value propositions.
**That is the language of
business.”**

99

**Kent Billingsley, Author & President
of the Revenue Growth Company,
Salesman.com Podcast.**



03. Value

The next step is to explain the big problem that you solve, your **value**. It's important to hit this step regardless of whether they are happy or unhappy with their current solution.

This is where you quickly introduce yourself and immediately transition to your value proposition. Be succinct here. No need to get into the weeds and take up more time than is necessary.

Cold Calling Script:

[After breaking their expectation and beliefs about their current needs]

My name is Sam, I work for Salesman.com. We help salespeople close more sales in the next 30 days or your money back.

★ COLD CALLING TIP:

Be sure to move on to this step regardless of the objection they offer.

If they say, “We’re happy with our current solution,” push through. They may be more open to new solutions than they seem.

If they say, “I don’t really have time for this right now,” you only have three more sentences to get through (15 seconds max). So just keep right on moving through.

The end goal is to get to a close and ask for a meeting, not to deal with all their objections in real time.



04. Tie-In

Next up, you need to **tie-in** the value that you just shared to the buyer.

How is your big solution actually going to help them? What kinds of benefits can they expect to see from working with you?

Essentially, *why should they give a shit?* Why should they stay on the line when they're well within their rights to politely say goodbye.

Again, be quick and to the point here. Make the connection, but don't dilly dally. Because we need to get to the next and most important step of the process.

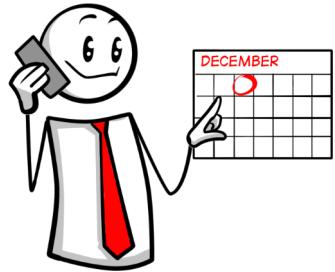
Cold Calling Script:

A

It seems like you're not happy with your current sales training solution. Would it make sense to see if we can solve this problem for you?

B

Would it make sense to see if we can add to your current solution so you can train more effective sales reps more quickly?



05. Close

Last and certainly not least, you'll want to **close** the call by booking a follow up meeting to run through a diagnosis call.

As best-selling sales author Jeffrey Gitomer told me in a Salesman.com Podcast interview:

"Cold calling is a lousy place to make a sale. But it happens to be a great place to learn how to sell."

Cold Calling Script:

It looks like we might be able to help. Does it make sense to jump on a quick 10-minute call tomorrow?

Voicemail: What to Say & How to Say It

The Cold Calling Framework is a great way to quickly engage your buyers and nudge potential prospects to set up a diagnosis call.

But what happens if your call goes to voicemail?

This can be tricky. You can't play off of the buyer's answers to your questions. And you've got to get them interested in what you have to say so they don't hit that delete button.

There are a few things you can do here to boost your chances of a callback.

1. Keep it short, under 30 seconds if you can.
2. Follow the 70/30 rule: 70% info and value, 30% personalization and social proof.
3. Be particularly clear with your contact details.

Now, I know every sales guru in the land tells you to save your name and number for the end the message. So that the buyer has to listen to the whole thing before they know who is calling. **Do the opposite.**

This is what's known as "pattern interrupt."

There are 6 MILLION AEs and 600k SDRs working in sales jobs right now. And guess what? They all save their name and number for the end.

Remember to be assertive, confident, and direct when you leave your voicemail message.

Cold Calling Script:

Hey Sarah, it's Will from Salesman.com 111.222.3333 - I'm calling because I read your LinkedIn profile and noticed [trigger event]. We helped [X company] drive [outcome] by [very short explanation of how your product works]. Again, Will Barron from Salesman.org 111.222.3333 (repeat your number), I'll follow up with a quick email.

Other Tips

By far the quickest way to improve at cold calling is to do more of them. After first 100 you'll see a big improvement if you use the framework and keep these additional tips in mind:

- The call to action comes at the end of the conversation.
- Never ask "how's it going". You don't care and the buyer doesn't care to answer.
- If the buyer brings up an issue with their current reality, quiz them on it. Get to the bottom of the pain and they're more likely to want to solve it.

- Relax. No buyer has ever put the phone down on a seller, got in their car, drove to the salespersons office and strangled them to death (probably).
- If you're ever struggling for pipeline cover (you should aim for 3-5x your sales quota in qualified leads in your sales pipeline) then pick up the phone and make additional calls for a couple of days to prospects you've not yet spoken to on the phone. This is on top of the calls already scheduled in your sales cadence.
- Typically, the more the buyer speaks the more likely they are to book a meeting. You should speak less than 20% of the time on the call.
- You're a professional. You're trying to help a business person improve the efficiency of the business they work for. They have an obligation to the business to investigate new, better ways of things. So never feel like you're a pestering people as long as you're professional with your cold call approach.

Remember: The Only Goal

We regularly role play cold calls on the group coaching calls inside Salesman.com Academy. One issue pops up over and over again.

The student transitions into a diagnosis call (you'll learn how to implement these in the final section of the book) when they get even the slightest a hint of a positive response from the buyer..

The only goal of your sales cadence and the steps within it, is to book a follow up meeting. No product pitches, pricing discussions or further analysis of the buyers problems.

Book the call and deflect any additional questions the buyer might have to the follow up conversation.

Stay focused.

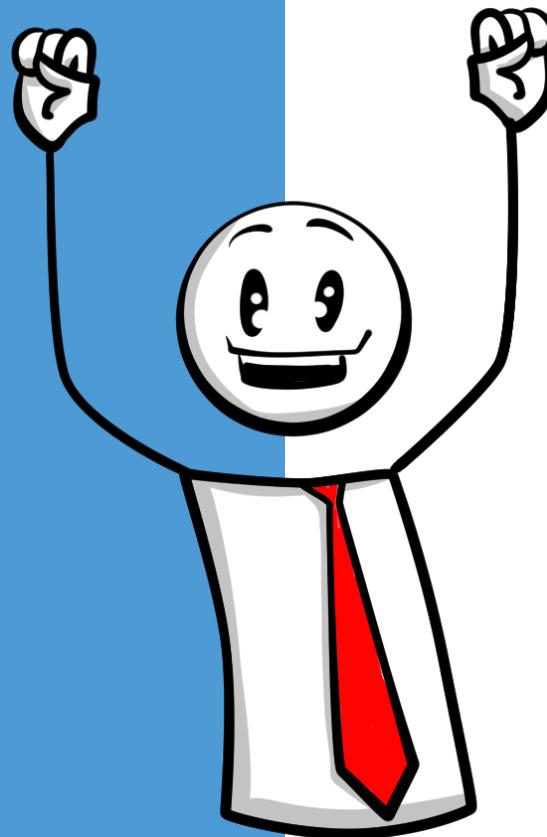


Wrapping Up

Cold calling can be intimidating at first. And if you've been hesitant to use this sales technique till now, you're not alone in the world of sales. *Plenty* of sellers avoid it.

But when you know how to do it effectively, it can open up the door to a wealth of potential buyers who you'd otherwise never have managed to speak too.

08. Social Lead Generation



Social Lead Generation

The less proof you have, the less chance people will trust you.

It's the same in sales. And the quickest way to build proof is through a little social media activity.

Walter was already hitting his sales quota. He had a compelling value proposition and sales cadence. So rather than getting more deals done, he wanted to do bigger ones. So he changed his ICP to CEO's but struggled to book meetings.



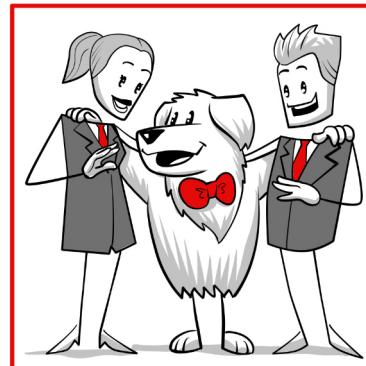
Walter asked Christopher why CEO's rarely replied to him, whereas middle management always responded positively.



Christopher explained that it was clear that he could solve middle management-level problems, but there was no evidence that he could solve CEO-level concerns.

Walter went away and built a network of executives on LinkedIn by sharing valuable insights on the platform. The next time he tried to connect with CEO's they were much more willing to give him a shot, as they could see their peers commenting on his content.

This chapter explains how to build social proof, so that booking meetings with decision-makers becomes easy.



Social Lead Generation Framework

This chapter shows you how to effectively incorporate social lead generation into your sales cadence.

LinkedIn is the best social media platform to start with for most sellers. Why? Because it's the most likely place that your B2B buyers are hanging out.

However, this framework can be very easily adapted for any social media platform.

In this chapter you'll learn the four-step framework that will allow you to leverage LinkedIn's potential to its fullest.

And with it, you can build a steady and robust pipeline of quality, qualified leads, whilst becoming known and trusted within your industry.

Best of all, once you get going, the system practically runs itself due to what is known as the "algorithmic flywheel".

The What & Why of LinkedIn

You already know that LinkedIn is a social media platform with a twist.

Unlike other social media platforms, LinkedIn's focus is on business. You won't find piano cats, baby pictures, or "Charlie bit me" videos here. Instead, it's all about connecting with other professionals, learning business-related tips for success, and growing your professional network.

For sellers, LinkedIn can also be a powerful lead generation machine.

As author and sales expert Marcus Sheridan put it in our Salesman.com Podcast interview:

"As a salesperson, a sales professional, go all-in on LinkedIn. I've watched salespeople's careers and therefore wallets and bank accounts explode because of the way they use LinkedIn."

But why? What makes LinkedIn so powerful for generating consistent, quality leads?

There are three reasons:

- A. It's huge.
- B. It's trusted.
- C. Trust at scale.

Let's take a closer look at each reason in a little more detail.

A. It's Huge

LinkedIn is a mammoth social media platform. And it's bigger than most people expect.

Facebook and Instagram and the like are bigger. But LinkedIn still has nearly 800 million members across the globe. Plus, there are millions of businesses with public profiles.

Beyond that, the wealth of information you can glean from these profiles is insane. Past positions and experiences, shared professional connections, industry interests—the list goes on.

The enterprising seller can use all this information to:

- Learn about new businesses that have recently entered their industry.
- Research competitors and their sales strategies.
- Become better acquainted with potential buyers.
- Discover talking points to use during sales meetings.

- LinkedIn has 33 offices, is available in 24 languages, and has 16,000 employees (LinkedIn).
- More than 57 million companies are listed on LinkedIn, as well as 120,000 schools (LinkedIn).
- Seventy-seven job applications are submitted via LinkedIn every single second (LinkedIn).

The Numbers

Wondering just how huge LinkedIn is? Here are a few stats:

- LinkedIn has nearly 800 million members in 200 countries and regions worldwide (LinkedIn).

B. It's Trusted

It's one thing to have access to a massive database of users. It's another thing entirely when those users truly trust the content they find on that platform.

A lot of that trust comes from the professional aspect of LinkedIn. These are businesspeople interacting with each other—not shifty scam artists trying to rope new members into their multilevel marketing “opportunity.”

It's also a trusted source of information. Most of the content here is being put out by real professionals, under their real name and photo with real experience in what they're talking about.

The Numbers

B2B marketers and businesses love LinkedIn. And here are some numbers to prove it.

- An astounding 94% of B2B content marketing happens on LinkedIn (Road Warrior Creative).
- LinkedIn ranks highest in digital trust among all social media platforms (eMarketer).
- There are more than 10,000 B2B software Product Pages on LinkedIn (LinkedIn).

C. “Trust at Scale”

As you scale your lead generation efforts, you’re also making it easier for new buyers to find you. At a certain inflection point, with a single post you’ll be able to reach many more buyers than you could ever cold call in a day.

Let me explain.

One of the biggest hurdles sellers have to overcome is building trust with buyers. You need to establish rapport. You’ve got to prove your worth. And you need to show that you’re there to help, not just sell to them.

When you encounter a cold lead, you accomplish all that through one-on-one conversations. Conversations take time.

But when you engage in a thorough LinkedIn lead generation strategy (like this framework), you’re creating content that does most of that hard work for you.

The Numbers

Business is getting done on LinkedIn. That’s because there are so many potential leads and buyers using the platform:

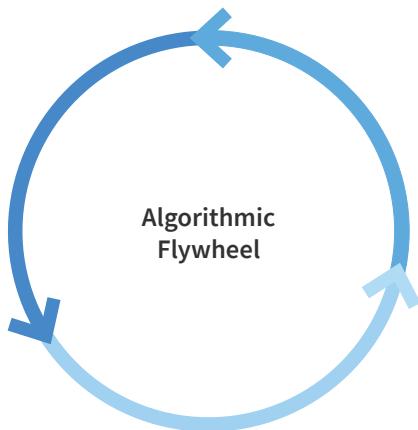
- There are 65 million decision-makers on LinkedIn (LinkedIn) and 61 million “senior-level influencers on LinkedIn (LinkedIn).
- 4 out of 5 LinkedIn members drive business decisions (LinkedIn).
- About 1 out of 3 B2B decision makers use LinkedIn to research products and solutions before making a purchase decision (Hootsuite).

HINT:

Almost all of the content that you will create and share in this framework on LinkedIn can be shared on other social media platforms as well.

But be careful. Don’t waste your time trying to build an audience on a platform if your buyers don’t hang out there.

The Algorithmic Flywheel



Alright, alright. LinkedIn's great for professional sellers like you. But how the hell do you use it to generate leads?

Enter the “Algorithmic Flywheel”.

Picture a huge, heavy, metal, vertical wheel with a rod running through and suspending it.

It's tough to turn the flywheel at first. It takes lots of effort to get it moving but once you get some momentum, it has a life of its own. Once it is spun up, it's hard to slow it down.

This is exactly how prospecting for new buyers is on the LinkedIn platform. Things start slow. But the more insights that you share, the better authority you build, the more effective your outreach becomes.

This is because the flywheel effect enables you to get more reach on your insight posts, more prospects see them and then the cycle continues.

At first when you post an insight, nobody cares. Nobody likes, nobody comments. You

might even feel a little embarrassed. But you post again, and you get one like. Then again and a few more.

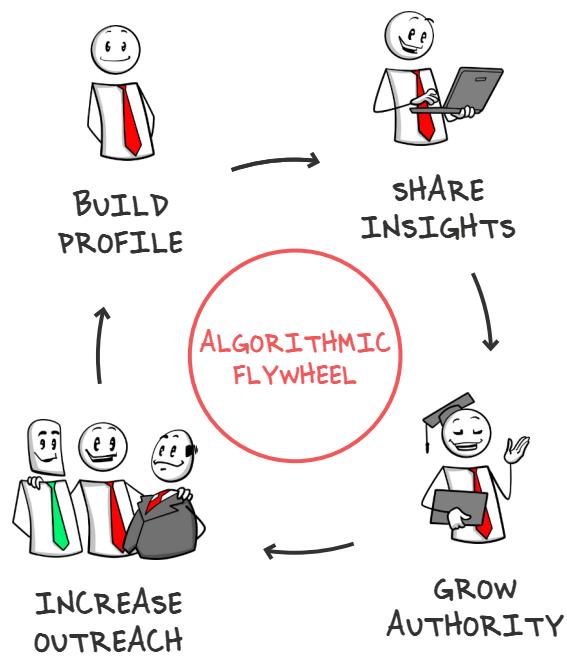
Eventually, LinkedIn's algorithm sees the traction, and it shares your content with more people as they perceive you as an authority. And that gets the big heavy flywheel spinning..

The cool thing? Once the flywheel is spinning, it has its own momentum. You can take a week off, it's barely slows down, and the sales leads keep coming in.

But to be clear, it does take time and effort to get that big block of heavy metal spinning in the first place. So be prepared!

The Social Lead Generation Framework

There are four steps to get started with this framework:



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It seems like everyone and their mother is doing online content these days. So every day there's something like a billion hours uploaded to YouTube and probably a couple hundred million hours uploaded to LinkedIn. There's content everywhere, and just getting someone to consider you for a moment to hook them in, if you know that you're able to really knock their problem out of the park, **that's what I've found to be the only way to kind of get in the door initially.**"

Marc McDougall, Founder of Clarity First Consulting,
Salesman.com Podcast.



01. Build Profile

The first step to getting traction on LinkedIn is updating your profile. The cool thing is that once you get this nailed, it will serve you for years to come.

LinkedIn is constantly adding and removing features and so I've kept my recommendations to the sections of your profile page that will have the biggest impact to your authority on the platform.

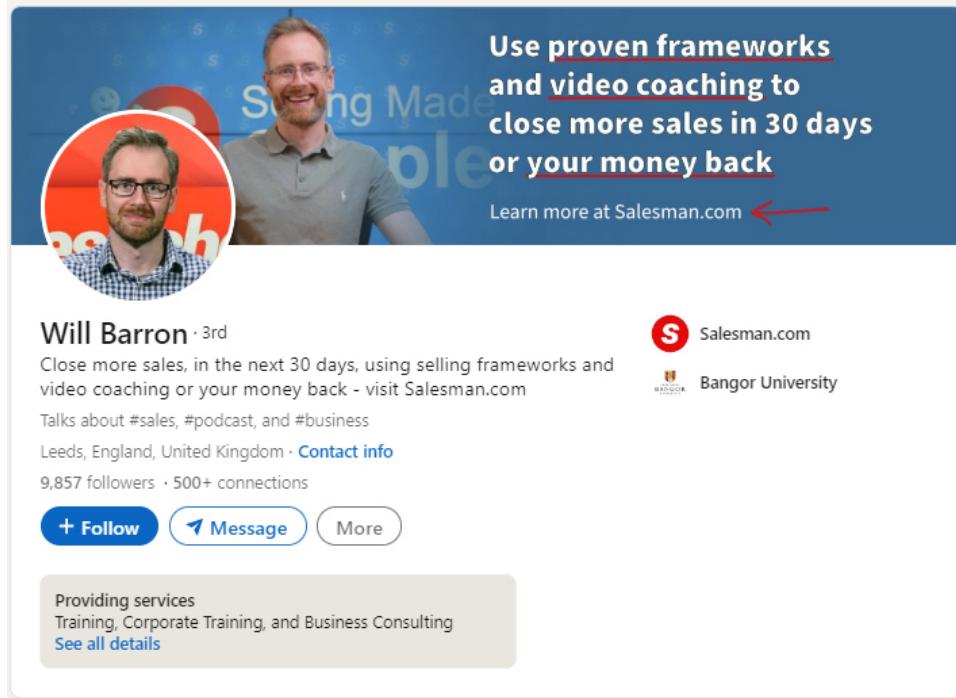
Working from the top down:

- **Header image** - This is a massively underutilized area for marketing what you do and how you help your buyers.

As you can see in my own profile I've pulled my value proposition from the earlier framework and literally plastered it on the header image. I've also included an easy to follow call to action at the bottom.

- **Photo** - Keep your photo simple. Looking straight at the camera, colored background if you can tie it into your companies brand. Smile and wear business smart clothing.
- **Headline** - When a buyer searches for a keyword on LinkedIn, a profiles headline is heavily weighted in their calculation. Therefore, if you want to show up in the search results for a specific keyword, you should include it in your headline.

As you can see in my headline, I've repeated my value proposition as it



includes my keywords of “close”, “sales”, “selling” and “coaching”.

- **Featured** - In your featured section you should be linking to the best, most insightful piece of content that you've created on the LinkedIn platform.

- **About** - Here is your opportunity to expand on your experience in the market and success stories. Don't get too carried away as the further down your LinkedIn profile we go, the less likely your buyers are to pay attention to it.

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The first two things [visitors] will look at 99% of the time **are your profile photo and your LinkedIn banner**. And what you want to try and do is plant some seeds.”

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Daniel Disney, Social selling expert,
Salesman.com Podcast.



02. Share Insights

If you want to start generating leads on LinkedIn, you need to be regularly posting insight content. There's no way around it.

This is the first step in pushing the LinkedIn algorithmic flywheel to favor you on the platform.

So, how do you uncover those insights that are actually worth sharing?

There are two types of insights that your buyers will find valuable:

A. Personal Insights

Personal insights are observations that you have uncovered about your product, buyer, or marketplace.

Sharing personal insights is a fantastic way to demonstrate your authority and engage with your audience. After all, you know way more about your product than your buyers ever will. So take the time to collect and share the insights you've picked up over the years.

A few questions you can ask yourself to start coming up with ideas include:

- What common sales objections do you face each day?
- What have you seen change in the marketplace in the last 12 months?
- What are your buyer's biggest fears?
- If your buyers could change one thing about their job, what would it be?
- What do your buyers need to know but not want to hear?

Use these questions as jumping-off points for finding the best insights to share.

B. Company Insights

Personal insights take some deep thinking and reflection on your part. When it comes to company insights on the other hand, things are quite a bit easier. Instead of picking your own brain, you pick the brains of others.

All you have to do to find a great company insight is shoot a quick email over to your sales manager and marketing manager asking them the following questions:

- What do you know about the market that you're selling into that is unusual or counterintuitive?
- What do you know about buyers that buyers don't even know about themselves?
- What shift is happening in the marketplace within the next 6 months that buyers haven't realized yet?
- What positions our products differently from everything else on the market?

That's it! Their answers are sure to give you a few nuggets of invaluable insight you can share with your audience.

How to Share Your Insights

Now that you've got your insights in mind, it's time to actually send them out into the world.

LinkedIn provides a couple of different ways you can share your insight content, including:

- Text posts.
- Video posts.
- Image posts.
- Articles.
- Lives.

There are other options too (like polls, stories etc.). But frankly, I've found them to be a bit gimmicky without bringing any more value to the table. So best to stick with the methods that are proven to work.

And don't forget to be consistent with your posting!

The more consistently and frequently you're putting up posts with real value, the faster your flywheel will spin.

Content Structure

LinkedIn is constantly changing and refining how they determine whether a post is high quality and shareable or if it's a load of crap and so they should kill its reach.

There are a few things you should consider when creating your post though that are reasonably evergreen:

- Hook your audience with the first line. Use the idea of the curiosity loop we discussed in the cold email chapter to get the buyer to read the rest of the post.
- Have call to actions in less than 20% of content. If you're constantly pestering your audience to book a call, they'll stop seeing your content as insightful and view it as an advert.

- Post your content and then return after an hour to engage on any comments. LinkedIn likes engagement and heavily weights the number of comments and likes within the first 24 hours in its sharing algorithm.

Don't Be Afraid to Curate Content

Without a doubt you need to focus on creating your own content by digging up personal and company insights. That's going to be the content that pushes your authority through the roof.

But that doesn't mean *all* of your content needs to be your own. And sometimes, curated content can be just as important for demonstrating your expertise.

Did you see a great article you think your buyers would love to read? Reshare it with a few of your own comments highlighting the best points.

Love a video a that thought leader in your field put together? Send it over to the people in your network who will get value from it.

A good rule of thumb to follow is **The 80/20 Rule**—sharing 80% personal content (you created) and 20% curated content (someone else created).



03. Grow Authority

The next step to the Social Lead Generation Framework is boosting your authority.

People want to spend their valuable time learning from experts, not nobodies. Experts have the answers they're looking for. And they're the ones that can be trusted.

Engage With the Platform

You should spend 15 minutes a day engaging on the LinkedIn platform by commenting on content from other experts in your space.

But a simple "Great post!" on everything that comes through your feed just won't do.

You've got to be strategic by knowing where to comment and what to comment:

Where to Comment

Look for posts that have a high comment count (better visibility) from within your industry. You'll also want to only comment on posts that you understand and are valuable. And finally, if your buyers are asking questions, you need to be the one to answer with an insightful comment.

What to Comment

Don't comment without reading the full post. You'll sound like an idiot. And always add to the conversation ("good job!" doesn't mean a thing). You'll also want to continue the conversation by asking more questions. Finally, use the "@" sign before the original poster's name in your comment. That'll make sure it doesn't get lost in their sea of notifications.



04. Increase Outreach

If you've been regularly posting valuable insights and engaging with the platform consistently each day, your flywheel should already be spinning and sending your insight content out to the masses.

Ideally, this will end up with leads reaching out to *you*. But you don't want to leave your fate in the hands of the algorithm, do you?

That's why you need to engage in your own outreach to make the most of your LinkedIn lead generation efforts.

This outreach is also what you will factor into your formal sales cadence when you're planning that out, step-by-step.

There are three ways to start bringing in leads on your own.

- A. Warm Outreach.
- B. Cold Outreach.
- C. Advertising.

A. Warm Outreach

Warm outreach is when you leverage your relationship with a prospective buyer to get them onto a diagnosis call.

To be clear, these are contacts you've *already* had a conversation with. They may be familiar with what you're selling. Or maybe you've just chatted with them over LinkedIn a handful of times. They might have even worked with a current customer of yours.

The important element here is *they know you*. And they likely already have some degree of trust in you. As a result, the process is surprisingly simple.

If you get into a conversation in the comments of one of your buyer's posts, message them directly and ask if they would like to set up a 10-minute call to discuss things further.

Hi Sarah, from our exchange in the comments earlier it sounds like I could help with X. Would it make sense to jump on a quick call to see if we're a good fit to work together?

If a buyer keeps liking your content, message them to see if there's value in setting up a consulting call where you can help them in real-time.

B. Cold Outreach

Cold outreach is a little trickier and this will make up the majority of the touch points on LinkedIn within your sales cadence. In this instance, the buyers don't know who you are - They're cold.

So, how do you win them over?

There are two rules to follow here:

1. Be Genuine

People hate it when they're being placated. And yes, they can tell. Even on LinkedIn. Instead, read up about your buyer. Find something you're actually interested in (other than closing a deal) to connect over. And be yourself in each interaction.

2. Personalize

Generic cookie-cutter messages don't work. They're annoying. Your messaging needs to be clearly personalized to the buyer. Otherwise, they probably won't even read it. You can use the Cold Email Framework to create short, sharp LinkedIn outreach messages that cut through the noise and get meetings booked.

C. Advertising

Advertising on LinkedIn is a different beast compared to both warm and cold outreach.

On the one hand, there's the completely different messaging that's required. You aren't having a conversation. You're blatantly presenting a buying/selling opportunity. And that means hitting different pain points more directly, using more evocative language, and focusing on distinct type of value-add.

Added to that, LinkedIn ads are *expensive*—some of the most expensive on any social platform. And if you're working for anyone other than yourself, you may not have the budget control to sink money into running ads.

But if you *can* run ads on LinkedIn, you'll find yourself with one of the most advanced targeting systems on the internet for B2B buyers.

You can pinpoint the exact type of lead you want your ads to hit based on a wide variety of metrics. And if you can nail your messaging, running ads here can be a fantastic investment.

That being said, ads have a problem.

They do not power your flywheel.

Sure, you can keep sinking money into ads. And you can get great results (if you do it right). But once you *stop* the spending, the leads dry up. And the success you've earned doesn't build on itself.

That's why I always recommend putting your time into **organic** content on the platform. Articles, podcasts, videos, insights, connections. That's what drives your LinkedIn flywheel. And that's what build the success you need to builds a touch-free lead generation system.

How Long Does It Take?

This is a tough one to answer because it depends on **you**.

The more value you offer and the more you engage with the platform, the faster you'll see your flywheel spinning. But if you put off posting for a month or two while only sharing low-value articles and unoriginal thoughts, it's going to take a lot longer to get results.

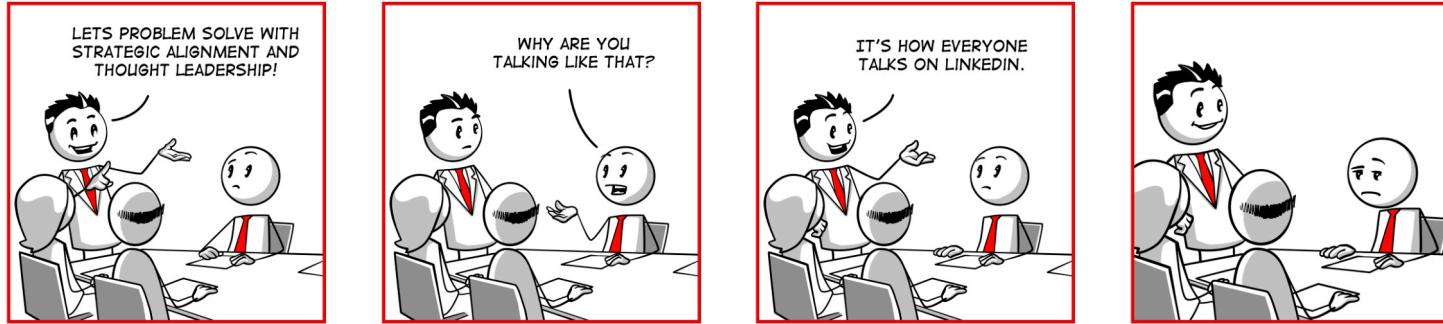
I have personally witnessed sellers use this method to grow their LinkedIn followers by hundreds (or even 1,000s) in a matter of weeks.

Generating enough momentum to start having buyers reach out to you may take a bit longer. But even still, if you stick with the framework, you'll have a healthy pool of prospects you can quickly and easily connect with to start booking more diagnosis calls.

“

LinkedIn ads are expensive. But what you get for that **is by far the best B2B targeting in the world.** You can target people by their job title, by their level of seniority in the organisation, what department they sit in, the name of their company, company size, company industry, education, etc.”

AJ Wilcox, Founder of B2Linked,
Salesman.com Podcast.



Wrapping Up

Social lead generation can be a goldmine for bringing qualified and eager buyers into your pipeline. LinkedIn is professional, highly trusted, and only poised to grow as more business gets done online.

The trick is, you have to approach your LinkedIn lead generation with a strategic eye.

Spamming content is a time-waster. Inauthenticity is a turnoff. And in a world of bots, bluffs, and bullshit artists, only those who offer *true value* to their buyers will really win here.

With the Social Lead Generation Framework you can start consistently revving up your presence on this powerful platform.

It takes consistency, genuineness, and a bit of elbow grease.

And best of all, once that flywheel starts moving, the sky's the limit for your lead generation efforts on LinkedIn—and your earning potential too.



**Explain
the Value
& Close
the Sale**

09.

Diagnosis Call

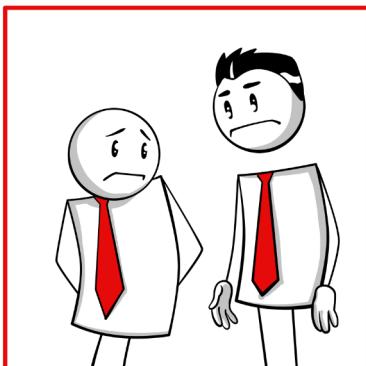


Diagnosis Call

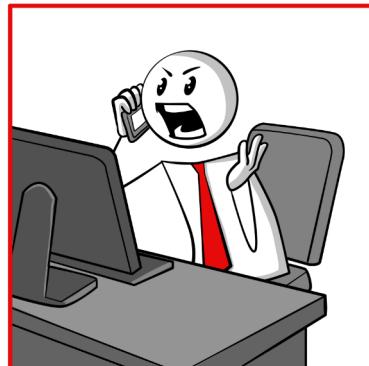
The less you understand a problem, the harder it is to solve it.

This is why it's essential to have a process to run qualification and discovery with your buyers. Otherwise, you'll never be quite sure how to help them solve their business pains.

Brian was breathing down Sam's neck. It was the end of the quarter; Sam was slightly behind quota but had a bunch of prospects in the CRM that looked like they were close to signing contracts.



Sam called, nagged, and shouted at the prospects in the CRM. He didn't close any new sales. The prospects were never qualified to do business with him in the first place.



Walter found himself in a similar position; however, he had one prospect who was qualified. Closing this one sale would mean that Walter would close the quarter strong.

Because Walter had one prospect he knew was highly qualified, he could spend more time with them, better understand their pain and shorten their sales cycle to close them in time.

This chapter explains how to qualify, do discovery, build commitment and close the sale on a single call.



Sales Diagnosis Call: Think Like a Doctor and Win More Sales

"If you are sick of being rejected, if you're sick of people ghosting you, if you're sick of people not replying to your messages, diagnosis your buyers problems and improve your qualification at the top of the sales process."

I said that in an interview not too long ago. And looking at it now, it might be the best advice I've ever given.

When you build diagnosis into your sales processes, you're setting yourself up for success.

Why?

Because when you understand your buyers deepest needs they are:

- More likely to buy.
- Less likely to waste your time.
- More likely to send you a referral.
- Less likely to question your recommendations.
- More likely to spend bigger amounts of cash with you.

And the best way to better understand your buyer is to run your discovery calls like... a doctor.

In this chapter, I'll be showing you the proven Diagnosis Call Framework. I'll also show you why sales qualification is so important, give your real-life diagnosis call questions to use, and explain why thinking like a doctor is the best way to take your sales game to the next level.

Ready? Let's go.

Why Diagnose At All?

A diagnosis call is your chance to put a lead through your sales qualification process. It's an opportunity to diagnose your buyers needs so you can offer them the correct solution.

So, what's the point of going through this "lead diagnosis" stuff anyway? Don't you want to work with *any* lead to maximize your chances of closing a sale?

Well, not necessarily...

Qualify Your Leads

Priority number one for your discovery call should be sales qualification.

Is this buyer a good fit for your solution? Are their expectations on par with what you can deliver? And can they afford it?

Lead qualification is a big deal. Unqualified leads mean more time spent closing and more time wasted on deals that eventually fall apart.

Here are some stats to give you an idea of *how* important lead qualification really is.

- **67% of lost sales** are the result of sellers not properly qualifying their potential buyers before taking them through the full sales process (Clover Mortgage).

- **Only 5% of sellers** said the leads they received from marketing were of high quality (HubSpot).
- **More than one-third** (34%) of sellers said prospecting and sales qualification were the biggest challenges they faced (Pipedrive).

When you learn how to effectively qualify a lead on a diagnosis call, you're also saving yourself from *tons* of wasted hours down the road. And that means you can focus on the leads that are more likely to buy.

Gather More Intel

Diagnosing your lead is about more than just qualification though. Diagnosis calls are also the *perfect* place to start refining your sales strategy.

Why?

Because a diagnosis call is the best place to gather more intel on the buyer, the problem they're facing, the bigger, bolder, brighter solution they want to move towards and how to position your product as the bridge to get them to their brighter, future reality.

We'll cover this in more details in a minute as we take a deeper look at the *The Reality Gap Method*.

Remember, when it comes to B2B sales, closing a deal isn't about charm. It isn't about sneaky persuasion techniques. And it isn't about duping a buyer into purchasing.

Instead, it's about **offering real value**.

And the more you know about the lead and the problem they're facing, the more value you'll be able to provide.

Unfortunately, there's often a disconnect between the value sellers think they're offering and the value buyers think they're getting. Here are some statistics to drive the point home.

- There's a gap between how much sellers say they focus on listening to their prospect's needs (**83% of reps**) and how much buyers report their needs are not being listened to (**62% of buyers**) (HubSpot).
- Nearly **4 out of 5** customers (78%) report that they don't feel understood by brands (IBM).
- Many sellers (**42%**) say they don't have enough information about the needs of the prospects they're trying to sell to (Lattice Engine).
- **2 out of 3** sales are lost due to sellers improperly qualifying potential customers before the sales process (Zippia).

Positions You as an Authority

Last but not least, a proper diagnosis call will also position you as a trusted authority in the eyes of your buyer.

When you can confidently (and competently) diagnose your buyer's issues and follow up with a solution that solves their problems, you're not a "pesky salesperson" anymore. Instead, you evolve into a valued consultant.

And being seen as a value-giver rather than a value-taker comes with some very real benefits:

No More Games

Zero callbacks, bargain hunting, hardball negotiating, feet dragging—all these games become a thing of the past when your buyers take you seriously. And that leads to massive time savings and far less teeth grinding for you.

Faster Closing

When you're an authority in the eyes of the buyer, they're more willing to trust you, rely on your expertise, and jump into signing contracts sooner. And we all know faster sales cycles translates to more commissions.

When you're an authority, it's clear you have expertise. And that means you're asking the right questions, providing relevant information, and focusing on the solutions that are going to drive value, not just a spent budget.

Here are some stats to show the value of boosting your authority in discovery calls.

- The top way sellers can improve the sales experience for buyers is to focus on providing relevant information, according to **61% of buyers** (HubSpot).
- Winning sellers ask between **12 and 15 questions** that demonstrate their expertise in calls (Mindtickle).
- Just **18% of buyers** trust that a salesperson has the customer's best interests at heart (Revenue.io).

Becoming a Doctor

The best metaphor I have for the mindset behind a successful diagnosis call is to act like a doctor.

When you visit a doctor they ask what the problem is. You answer. Then, before they tell you the solution to your painful problem, they ask more questions. They send you for a scan. They sit in their white coat, emotionless, making notes and then they quiz you on a couple of related points that you hadn't even considered could be tied to your acute pain.

Only when they have the full picture do they make a formal diagnosis and offer a solution.

Can you see how this literally the opposite of most sales calls?

On an average sales call, if the buyer mentions any pain whatsoever, even the slightest of niggles, the seller usually shoves a product pitch down their throat and tries to close the deal.

Talk less, ask more, diagnose and you'll close more deals.

So, to diagnose your buyer like a doctor, you've got to *think* like a doctor. So, how do you get in the right mindset before your call?

Zero Judgment

A doctor doesn't judge their patients. They don't wag their finger and look down their nose. Instead, they accept the facts as they are so they can provide the most evidence-driven solution they can.

- **Diagnosis Call Pro Tip:** Try being a bit (but only a bit) detached after asking buyers questions. You don't immediately have to make comments or offer opinions. But instead, take the facts as they come.

Patient-First Approach

If a doctor can help, they will. But if they can't, they'll refer the patient to a specialist that can. If you're not a fit for the buyer, don't force it. Doing so will just lead to more work and less results.

- **Diagnosis Call Pro Tip:**
Get comfortable referring more buyers to other sellers, departments, or even solution providers. Not only are you removing unqualified buyers from your pipeline. But you're also strengthening your relationship with your colleagues at the same time.

Keep It Real

If a patient is in trouble, a doctor doesn't mince their words or pull punches. They explain the severity of the problem and the pain of the solution clearly and directly.

- **Diagnosis Call Pro Tip:**
Dancing around the topic and speaking vaguely creates distrust. Being upfront and direct builds rapport. If you have something to say, say it. As my Dad would say "don't be soft, share the truth".

Be In Control

You are the doctor, not them. You have seen and solved these problems hundreds of times. They haven't. And that means you are the one in control. If a patient is playing up or not giving truthful responses, a doctor doesn't battle with them. They ask them to leave. And the same should be said about your diagnosis calls.

- **Diagnosis Call Pro Tip:**
You are a professional. If someone isn't giving you the respect you deserve on a diagnosis call then say, "sorry, I think we're off track here. I thought you had X problem..." and then shut up. Let the buyer realize that they're the one with the issue, not you.

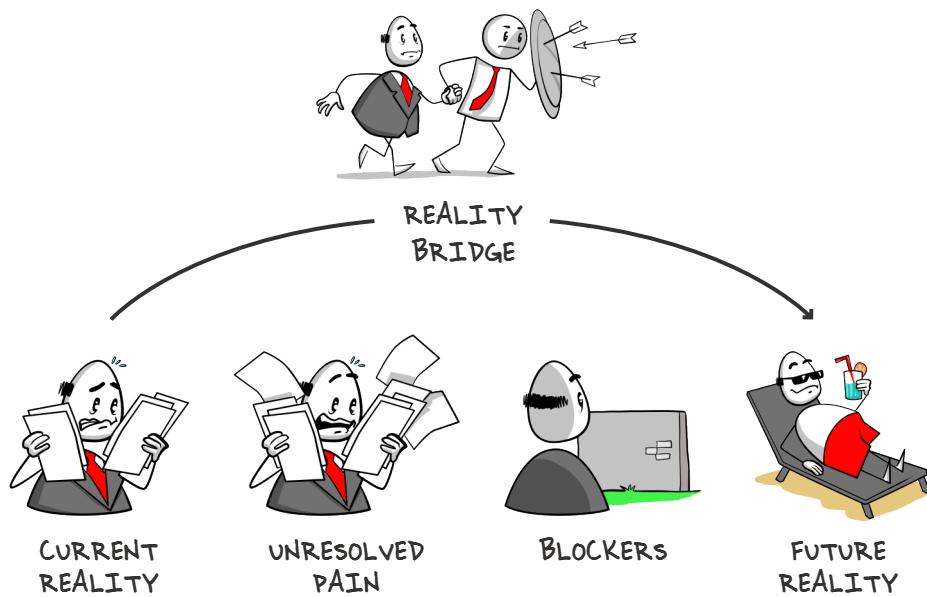
The Framework Under the Framework

I introduced the The Reality Gap Method in the cold email chapter. You make a guess at the buyers current reality and where you think they want to be in the not too distant future.

The good news is, if you've booked a meeting with a buyer using cold outreach, they've booked the call because your prediction of where they are right now and where they're trying to get was somewhat accurate. At the

very minimum they're intrigued to see if you can help them get from one place to another.

Now that we have the opportunity engage with our buyer in real time on a diagnosis call, it's our job to test the hypothesis we made earlier by asking them a series of questions and see how deep the rabbit hole goes...



The rest of the book will guide you through the process of encouraging the buyer to see you as their reality bridge:

- Uncovering the buyers true **current reality** and then doing deeper to find their **unresolved pain** is completed in the *Diagnosis Call Framework*.
- Getting the buyer through any **blockers** that are stopping them taking action is achieved with the *Beating Status Quo Framework*.

- Creating the **reality bridge** and helping the buyer agree that you can help them to reach the other-side is wrapped up in the *Closing Framework*.

The Reality Gap Method is the framework that is subtly happening below all of the other frameworks in this book.

Why Now?

I find in our coaching and mentoring program Salesman.com Academy it's useful to dive a little deeper into The Reality Gap Method at this point in the training. This is because far too many sellers try and sell features and benefits rather than solutions.

Our students at Salesman.com Academy don't want unlimited group coaching (feature). They don't really want to get mentored to become better at sales (benefit). They want to earn lots of money, reliably, by working smarter rather than harder in their sales role or in their small business (desire).

They want to open their laptop each morning, feed their sales cadence with their buyer list, book meetings, ask questions, deliver value and get paid. Whether they invest their new wealth to retire early, paying for private schooling for their kids or throwing it at the latest Lambo... they work with us because they want to reach their personal future reality.

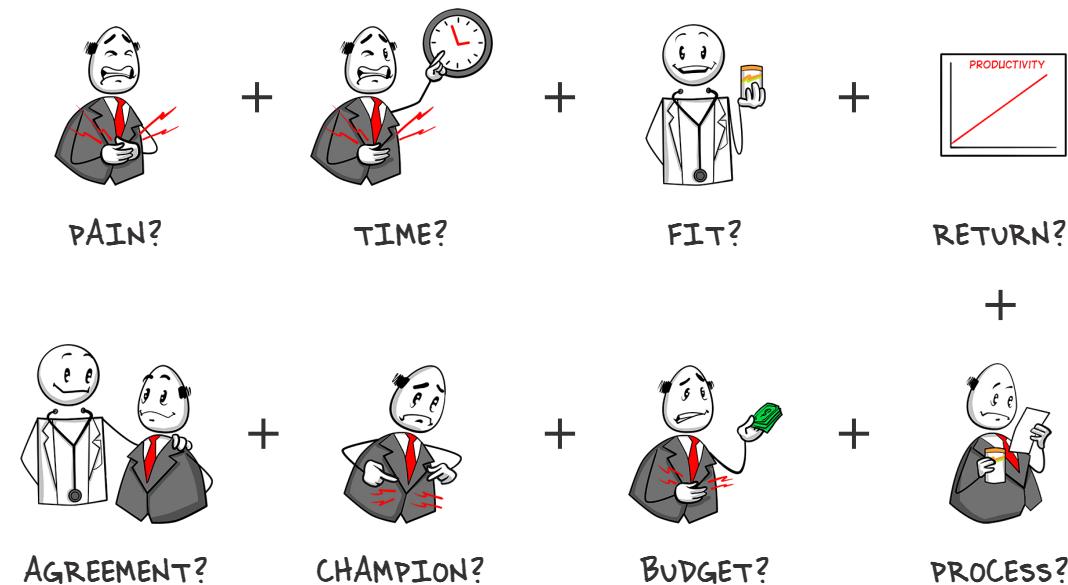
To win more deals from your buyers, you need to use the following Diagnosis Call Framework, to uncover the future reality that each, individual one of your buyers would love to live in. Then you can position yourself and your product as the bridge between where they are right now and that brighter future to get the deal done.

The Diagnosis Call Framework

Paging Doctor... Doctor Sales...

So now that you know how to get in the right sales diagnosis mindset, it's time to go over how to structure your diagnosis call.

There are eight elements in the Sales Diagnosis Framework that you should run through in order. the call in a little bit too.



66

Before, 50% of decision making might've been emotional, 25% was logic, and 25% was trust. **We've now shifted to where most of the buying decisions now, 50% is based on trust.**"

Tony Pisello, Chief Evangelist for Sales Enablement at Mediafly, Salesman.com Podcast.



01. Pain

As a sales doctor, your first responsibility is to assess whether or not the patient is actually in pain.

Is their issue actually a problem? And most importantly, is the buyer in “pain” because of that problem?

The buyers you want to work with are feeling the hurt from their problems. And as a result, they’re going to be highly motivated to **find the right solution**.

Diagnosis Call Questions:

What led you to getting this call booked in with us today?

This question gets to the heart of the buyer’s issue. What is the main reason they’re talking with you right now? In some cases, you may have to do a little more digging. But with this question, you at least get to uncover a kernel of truth, even in the most tight-lipped buyers.

What's stopping you from solving this issue yourself?

An essential follow-up to the previous question. A common objection that you will find in the Beating The Status Quo Framework is that the buyer thinks that they can solve the issue themselves. This question will help you uncover the “DIY” objection before they throw it at you later in the sales process.

Have you used other providers to solve this problem before?

This is a window into which competitors they’ve used in the past (or are even using now). Additionally, this question opens up the door to conversations about not just what obstacles they’ve run into with other providers. But it also highlights the pain points the right provider will need to address in order to win the sale.

Just be sure to stay professional when talking about your competitors in the same field.



02. Time

Unfortunately, not all problem and solution timelines are going to line up—both in medicine and in sales. One of your primary concerns when diagnosing buyers is the timeline they have to follow to get their issues solved.

Are they thinking today? This quarter? Or in the next few years?

The right answer to qualify your buyers will depend entirely on your unique business and

solution. But in general, you shouldn't be working with buyers that aren't interested in solving their problem soon.

If your buyer doesn't have urgency, they won't be compelled to act. And as a result, you'll likely encounter plenty of feet dragging and time-wasting along the way. It's better to disqualify the buyer and explain that you're not a fit early on.

Diagnosis Call Questions:

When does this issue need to be solved by?

This question doesn't mince words. And as a result, the buyer's answer will give you a clear, no-bullshit timeline of when they are hoping to solve their problem by. You can then assess whether the time-frame is realistic and if you can meet it. If the answer to both is no, then cut the prospect loose.

Tell me about your goals relating to this project.

Use this question to evaluate how your product's implementation schedule compares to the goals your solution addresses.

“

I am of the firm belief that you can't cause urgency and you can't push people into something that they're not ready to do. **What you can do is you can shine a light on something** and you can see if that light bulb goes on in the prospect's head.”

Josh Braun, Co-Founder & CEO of Sales DNA,
Salesman.com Podcast.



03. Fit

As the doctor in this selling scenario, it's important to ask yourself, "Can I really fix this patient's problem?"

Now, to some sellers, this question is equivalent to blasphemy. "Of course my solution is right for the buyer! It's right for everyone! It just depends how well I sell it." But the truth of the matter is there's no perfect product or service for everyone. And saying otherwise is just playing into the public's idea of sellers being con men.

Instead, it's your job to think of yourself as someone who offers **value**. Not all doctors have the drugs, surgery skills, or psychiatry training to heal every patient. And when they run into a patient they can't fix, they refer them to another care provider.

Think of yourself the same way. And don't waste time with someone who doesn't need what you're selling.

Diagnosis Call Questions (to ask yourself):

Do I have the solution for this buyer's problem?

Once you've learned about the buyer's pain and their desired timeline, you can figure out if you offer the right solution to solve that problem. Honesty is crucial here. A good doctor doesn't oversell their capabilities.

Do they really need this solution?

As much as it may pain you to say it, the buyer may be sitting on the perfect solution already—and one they can implement on their own. Time to get honest again. Is your solution really necessary? If not and the sale goes through, the buyer will likely resent you once they find out they could have easily solved the problem themselves. And that means negative reviews, zero loyalty, and no earned referrals.



04. Return

Every treatment has its ups and downs. Side effects, recovery time, medication contraindications—no matter what the solution to the problem is, there's going to be at least a touch of discomfort involved.

Same goes with sales. Buyers need to change vendors, hire new staff, train on novel systems, or fight to change a budget.

The question is, is the value your solution provides worth that discomfort?

How much *will* they have to change to accommodate it? And when all is said and done, will they look back on the investment as a good purchase or one that ate up too many resources?

Going through this calculation upfront is a must during qualification of sales leads.

Diagnosis Call Questions:

How would things be different if we solved this for you?

What will actually change for the buyer once they implement your solution? Is it a simple quality of life difference? Or does the switch lead to real change for the business on a fundamental level? This question is key because no matter how well you think you understand your industry, every business is different. And asking the buyer outright will give you better insight into the real value your solution offers.

What is your motivation to make this happen?

On its surface, this question seems similar to the previous one. But asking it helps uncover the subtler influences that are pulling the buyer. Do they need to hit a certain quota before the quarter's end? Are they getting complaints from their team? Or maybe their customers? This is all valuable info you can use to determine if this buyer is a good fit.

What revenue are you at right now? If we took you from \$X to \$Y would this be worth investing in?

Last but not least, let's talk about the numbers. If your solution provides as much value as it has with past customers, will that lead to a tangible difference for the buyer? Would they appreciate that change? And would it be a step in the direction the buyer is looking to take? If not, they may not be the best lead to sink your hard-earned time into.



05. Process

A doctor needs to understand how the patient would implement a drug, dietary change or surgery before they can make their best recommendation.

Similarly, you need to understand the process the buyer would have to go through to get your product implemented in their organization.

Who needs to be involved? Have they implemented a tool like this before? How do contracts get paid? Can they only sign off a certain amount of cash? Does a procurement team need to be involved?

These are all process questions that need to be answered before you can accurately understand the buyers internal processes.

Diagnosis Call Questions:

When your organization has done similar projects in the past, what did the process look like?

This question gives you a clearer idea of what lies ahead should the buyer be a good fit to work with you. How much work will they have to put in to overhaul their system? How much work will you have to put into training and getting their team up to speed? Basically, is the work required reasonable or is it too much of a hurdle to get started working with you?

What other individuals or teams will be involved in the implementation process?

This question is a two-for-one special. On the one hand, it gives you clearer insight into how much legwork and training will be required before your solution is up and running. On the other hand, it also points to any other decision-makers that might not be involved at the moment, but will be later. If you uncover that there are multiple decision makers, then you will need to multi-thread the account.



06. Budget

Health services cost money, whether it's you footing the bill or an insurance company.

The same is true in business. And as touchy of a subject as budget can be, it's absolutely essential that you get a feel for your buyer's budget before you consider them qualified to work with you.

Now, that doesn't mean you have to *lead* the diagnosis call with questions about money. And in fact, doing so may turn off the buyer, sinking any hopes of a deal.

Instead, lead up to budgetary questions.

Handle the subject professionally and communicate directly. Think of it as just another aspect of the qualification process.

Use the questions below to get the necessary details *without* scaring off the buyer.

Diagnosis Call Questions:

How are projects like this funded?

Not all projects fall under a clean and uniform budget. Sometimes they're spread over multiple teams and departments for example. With this open-ended question, you'll get a better idea of how many hoops your buyer will jump through to get funding. On top of that, you'll have a better idea if the person you're speaking with is the final decision-maker or if they'll have to loop in other department heads before settling on yes or no.

Is a project like this in this year's budget?

Straight to the point here. Does your buyer have funds allocated for your solution in the current fiscal year? If so, then full steam ahead. If not, you may be twiddling your thumbs waiting for your buyer to secure the proper funding. And depending on your priorities, that may mean this lead isn't a good fit.

What financial scope do you have to solve this issue?

Another question that doesn't pull any punches. How much are you willing to pay for this? Is it in line with the price point of your solution or too low?



07. Champion

When it comes to undergoing serious medical care, most patients will consult with friends and loved ones about their options.

With sales, your buyer's purchasing decision is often going to be influenced by other individuals in the business. It could be heads of other departments, higher-ups in the C-suite, or even influential team members below them.

That's why it's important to figure out who these other individuals (known as "champions").

A champion could be someone who gently and informally influences your buyer. On the other hand, it could be someone within the account who will shout your praises and close the deal on your behalf.

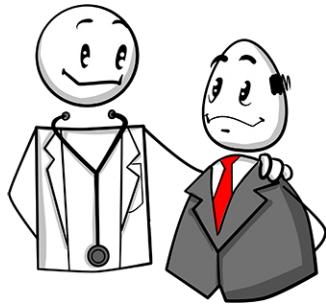
Diagnosis Call Questions:

Is there anyone that your team looks to when implementing projects like this?

This subtler approach to help uncover any other decision-makers that may influence the deal. This question has the added benefit of getting a bit more background on other solutions the buyer has used to solve the problem before.

If you were to make a purchase decision, who else would help with that process?

A bit more direct than the last one, this question pushes the issue a little bit more. Are they the only person involved here? If not, who else are you going to have to convince? And when do they come into the sales process? Figuring this out early is key to a smooth sales process.



08. Agreement

Imagine this...

A doctor is with a patient. They talk about symptoms the patient is experiencing, recent changes that may be the cause of the problem, possible treatment options. And finally, after **hours** of investigation, they land upon a suitable solution.

And just before the doctor is about to start treatment, the patient decides they're going to think about it and get back to them in a year or two. And oh yeah, **they didn't pay**.

Ridiculous, right?

As a sales doctor, it's up to you to get your buyer's verbal commitment that they will move forward with your recommendations on the call. Otherwise, they're liable to walk away after you have put in days or even weeks of your hard work, trying to help them out.

We cover the agreement step in much more detail in the Closing Framework towards the end of the book.

Diagnosis Call Questions:

You're a good fit to work with us. If we can solve X, will you commit to Y?

This time-tested formula has it all—validation, a hint of flattery, results anchoring. By asking this question, you're tying your solution to a specific result. And equally importantly, you're influencing the buyer to commit to that solution, provided you can achieve the results you promise.

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In investigations and in sales, **we are striving for a commitment not compliance**

Compliance is essentially obeying an order.

It's very short-term, it breeds resentment.

Commitment is achieved when people have the opportunity to at least take some idea ownership for the process, and the linchpin behind all of this is encouraging people to protect their self-images throughout the entire process.”

**Michael Reddington, Certified Forensic Interviewer
& President of InQuasive, Inc., Salesman.com Podcast.**

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The Three Key Points of Your Diagnosis Call

Now that you have the 8 steps of the Diagnosis Call Framework nailed, let's look at how the steps are positioned in a call with a buyer and I'll give you some additional useful questions to ask too:

1. Intro

When you first connect with your buyer it's useful to have 30 seconds of polite back and forth before you get into the diagnosis call itself.

Then when you're ready to get started you can transition to the Diagnosis Call Framework and take control of the rest of the conversation by asking:

We can get started if you like?

Yes, please.

Great. The way these calls usually go is that I'll ask a few questions and see if you're a good fit for what we do. If you're a good fit, I'll explain our product and then you can let me know if you'd like to move forward with it, or not. Does that sound good?

HINT:

There are a couple of subtle things we're doing by asking these two questions at the top of our diagnosis call. First off by saying "the way these calls usually go" you're positioning yourself as the authority. You're letting the buyer know that you've been through this process countless times before.

Additionally by sharing "you can let me know if you'd like to move forward with it, or not" you allowing the buyer to feel like they have some control over how things are going to go. This is important because if the buyer feels boxed in or manipulated, they're never going to share the information that you need to help them.

2. Transition

When you have been through the diagnosis questions, it's time to transition explaining how you can help your buyer move towards their future reality. This should be a seamless process. You can use the transition line to switch from diagnosis to a value explanation:

I think we can help. Would you like me to explain what we do?

Yes please.

OK, awesome. We help X people, solve Y problem, with Z process. For you it would look like...

★ HINT:

With this transition we're getting the buyers permission to explain our offer. They're telling us that they proactively want to learn more.

Getting permission is a pattern interrupt for the buyer. This is because on most sales calls, the seller attempts to launch their pitch down the buyers throat at even the slightest hint of an opportunity. Instead, we're taking a consultative approach.

3. Close

At this point in the diagnosis call we have; taken control of the conversation, understood our buyers current reality, future reality and then positioned our product to bridge from one side to another.

Now it's time to close the next step of the sales process. The next step of the process will differ depending on your product, service, industry and deal size.

You might need to close the software demo, close the next meeting with all the stakeholders or close the deal itself.

To transition to the close you can ask:

We want to get you from X to Y. Is there anything missing from what I've just shared with you that would stop that happening?

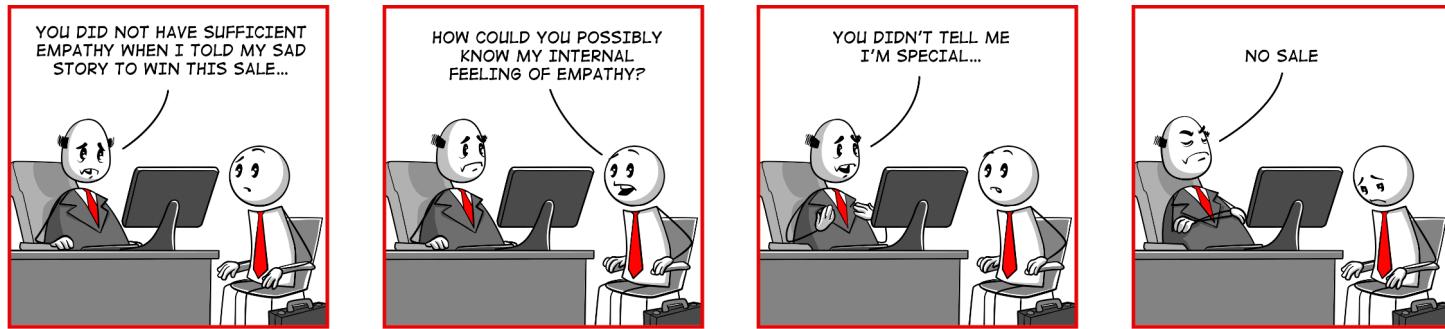
Nope, everything sounds good.

OK, great. Does it make sense to get started with X?

 **HINT:**

This question is not a old school sales manipulation technique. We're genuinely trying to uncover if there is anything missing in either our process to deliver the result to the buyer or their understanding of it.

Unless you address this head on, you'll get strung along by buyers who think you might be able to help but aren't completely sure.



Wrapping Up

The sales diagnosis call is one of the most important steps in the sales process. It's your first opportunity to really understand the buyer and done correctly you'll set up things up for an easy transition to a closed deal.

Remember, stay cool and collected. And always approach each patient with the intent of *solving the problem*, not necessarily getting them to buy your solution.

10. Beating Status Quo



Beating Status Quo

If someone doesn't have a reason to move, they will stand still.

Most sales leads end up in a perpetual state of limbo. The quicker you can help the prospect move past the status quo, the more likely you are to win the business.

Gerald told Sam that he needed more activity to close the sales that were getting stuck in the middle of his pipeline.



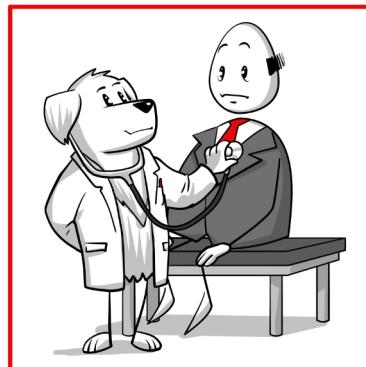
Sam sent emails and flowers and knocked on doors to try and move these deals along. Nothing happened.



Walter took a different approach. He took the time to understand why each prospect hadn't made progress and then gave them both a logical and emotional reason why they should.

As a result, he shrunk his average sales cycle length by 30%.

This chapter explains how to knock a prospect into action by giving them everything they need, both logically and emotionally, to commit to moving forward and getting the deal done.



Overcoming the 7 Buyer Beliefs

Sales is often looked at as a zero-sum game. Buyers either choose you, or they choose the competition. There's no in-between.

But what a lot of newer sellers don't understand is that there's actually a *third* option for the buyer to choose from—the status quo. A buyer doesn't have to make a purchase. Instead, they can just stick with what they've already got. And in fact, the overwhelming majority of deals are not sunk

by prospects flocking to the competitors. But by prospects who decide, "Eh, we don't need a new solution after all."

It's often eliminating the status quo—not the competition—can be the change that gets you above and beyond quota.

In this framework, we're looking at how the status quo impacts your buyer's decisions. Then we'll dive into the 7 status quo beliefs you need to break through to earn a YES.

For each belief, we'll examine:

- How the belief is holding them back.
- Why the belief is important.
- The objections you'll hear if they hold the belief.
- How to eliminate (or replace) the belief so you can get the deal done.

Why Do Buyers Get Stuck?

The status quo is the prospect's existing state of affairs.

For most B2B purchases, the buyer can delay, change their mind, or stick with their current supplier without too much backlash. In all my years in the industry, I've *never* seen a B2B purchase be a matter of life and death.

So, why do buyers delay getting the deal done?

Because change is scary! It comes with risks. Pitfalls. Learning pains. And humans on a fundamental level are wired to fear **loss** more than we desire **gain**.

The status quo, then, is the safe space. It's a riskless, lossless padded room with no sharp corners... but also no windows.

Breaking Through

Something cool happens when you manage to tear down a prospect's "business-as-usual" mindset—they start closing *themselves*.

Almost all objections come from a buyer when they're considering whether it's worth the effort of breaking away from their current

status quo and adjusting course to a new, less painful future reality.

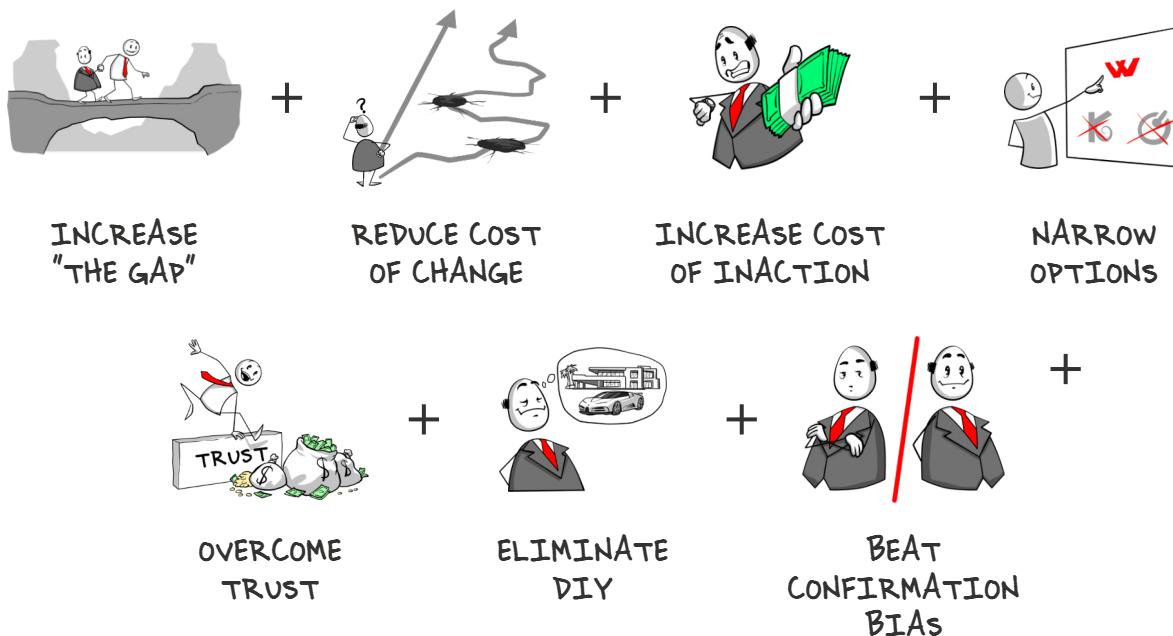
If you can guide them through this process and *tear down* their status quo, there will literally be nothing left for them to object to on the other side.

And to do that, you need to know how to address the 7 biggest status quo beliefs.

The Beating Status Quo Framework

When you're dealing with the status quo, there are 7 major beliefs you'll run up against.

Let's take a closer look at each. And most importantly, show you how to tear each of them down one by one.



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There's about three million companies selling B2B. For most of those companies, is their main competition their competitors or the status quo? **For most, it's actually the status quo.** And so the great salespeople understand that and they understand what it takes to overcome the status quo in buyers' minds and the average salespeople don't. They just keep on plugging away.”

John Asher, CEO of Asher Strategies, Salesman.com Podcast.



01. Increase “The Gap”

The first issue that gets buyers stuck in the status quo is when there is no gap between their current reality and their future reality.

This status quo belief is perhaps the most common. And it deals with a core aspect of selling—the buyers level of pain.

Why Does It Hold Buyers Back?

In order for a buyer to want a solution, they first have to have a problem that needs solving. Your buyers pains can come in two forms:

A. Problems

An active pain that needs to be solved. Something is wrong, and it needs fixing. A problem might be:

- Low job security.
- Lack of sales.
- Unhappy customers.

B. Unfulfilled Desires

This type of pain isn't so much about what's wrong now. But rather what *could* be possible in the future. Things could be better. An unfulfilled desire might look like wanting:

- To earn more money.
- A promotion.
- More respect throughout the organization.

Why Is This Belief Important?

Simple—if there is no problem, there is no sale.

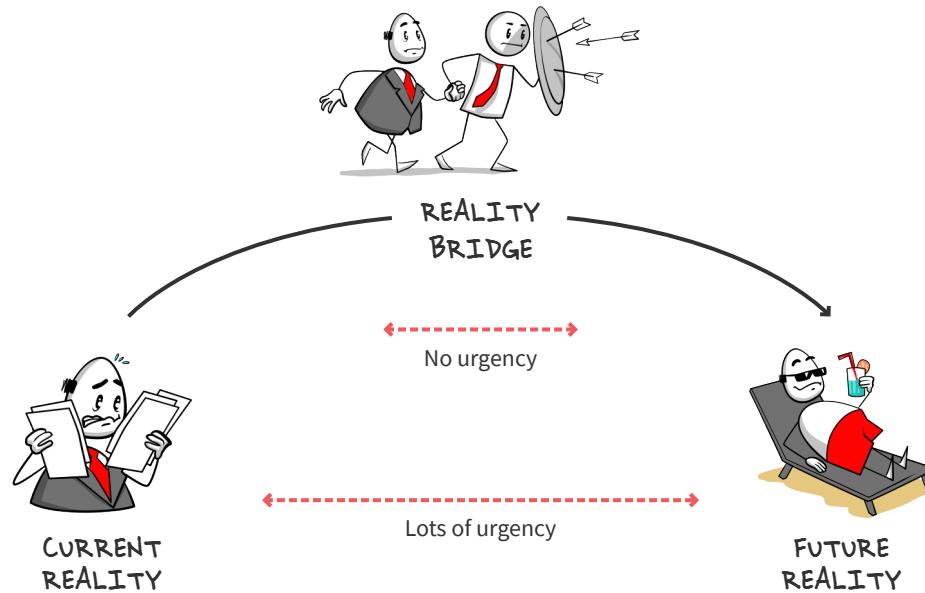
As I shared in the previous chapter, the gap between the buyers current reality and their future reality make up The Reality Gap Method.

Now if the gap between the buyers current reality and their future reality is small, then they won't feel like there is any urgency to make the leap.

So what we need to do is to stretch out that gap so that it's big enough that the buyer needs us to help them across. Business is about solving problems. And if your buyer doesn't feel like there's a big problem staring them in the face, then you're never going to be able to close them.

Now, if there's only a *small* gap between their current and future realities, the buyer will do one of two things.

1. They'll try to solve it themselves (or they'll say they will but never get around to it).



2. They won't go through the pain of understanding, buying, and implementing a solution.

Well, you can start by looking out for these objections.

I don't think this is a big issue for us.

And as you can imagine, both are bad news for you. So do deal with it, you need to make the gap bigger so that the buyer comes to you for help.

I don't have the time to do this.

Objections to Listen For

So, how do you spot this status quo belief?

How to Eliminate This Status Quo Belief

If you hear these objections, you can tear down this status quo belief and widen the reality gap by following 4 steps:

A. Define Their Current Reality

Where are they now? Get them to think about their current situation in detail by outlining:

- **Facts** – What are the hard data points that describe their current reality? Sales numbers, revenue, turnover rates, etc. all work great here.

- **Impact** – How are those hard data points impacting their position? Are they working harder? Missing goals? Losing trust?
- **Emotions** – What are the emotions those impacts are causing? Anxiety? Depression? Burnout? Shame?

B. Uncover Their Future Reality

Next, outline what their future reality looks like once they solve their problem. What would their bigger, brighter, bolder future reality look like? A good strategy here is to go through the previous 3 points again (e.g., “meeting your sales numbers would mean hitting your goals, reducing anxiety, and feeling more confident” for example).

C. Assess the Gap

Are these potential benefits big enough in their buyers to invest the time, money, energy, and risk to work with you? If not, then you need to make their future reality more exciting with fewer downsides and their current reality more painful and intolerable.

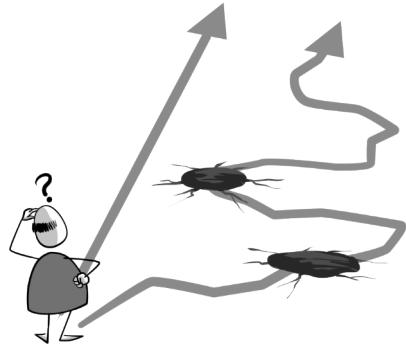
D. Widen the Gap

You have to widen the gap to the point where they MUST take action before they’ll allow you to help them from one side of their gap to the other.

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People are more motivated to avoid a loss than to achieve a gain. So unless your benefits overwhelmingly outweigh the risks by five times, it's going to be tough to make a sale.”

Michael Harris, CEO of Insight Demand & Experienced Sales Trainer, Salesman.com Podcast.



02. Reduce the Cost of Change

The next status quo belief involves lowering the initial cost of change.

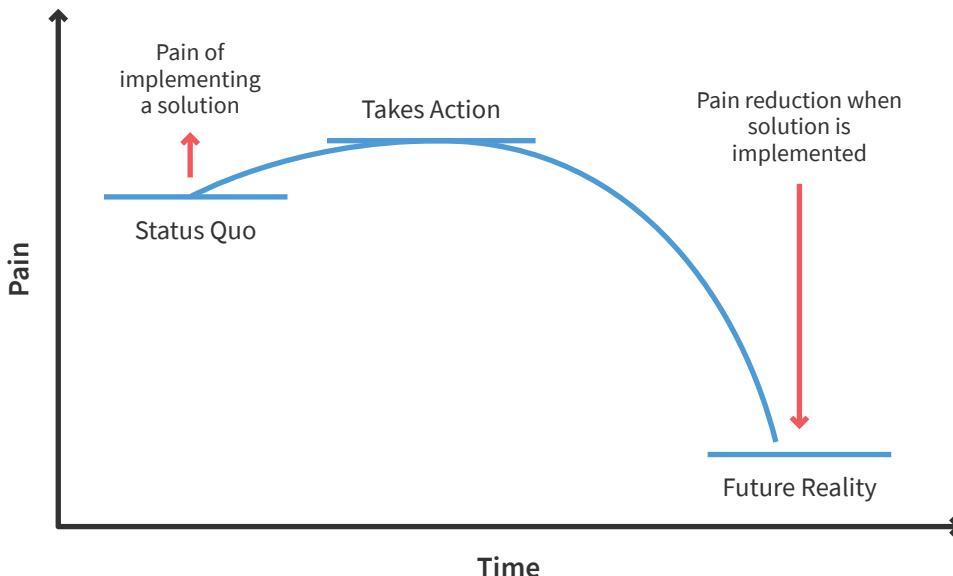
Why Does It Hold Buyers Back?

Nobody likes spending a bunch of money on something only to have to do additional work before it solves their problems. But guess

what? For complex B2B purchases, that's just the way it goes.

Whether it's training, time-consuming tech implementation, or even fighting for the budget, any solution is going to come with a bit of pain.

Think of it like this:



Before the buyer gets the benefit of the “pain reduction” when the solution is implemented, they have to go through the “pain of implementation”. If the buyer is already stressed, time poor or this project isn’t a priority for them, they’ll do their best to avoid the initial pain of implementation.

Why Is This Belief Important?

We all know people who decide to live with the pain of a problem (maybe they’re overweight or stuck in a dead-end job) rather than put in the effort to fix it.

And if your prospect isn’t willing to put in X effort to get Y reward, then they’ll never make a purchase from you.

Objections to Listen For

Objections to watch for here:

I don't have the time/energy to implement this right now.

We'll look at dealing with this next quarter.

How to Eliminate This Status Quo Belief

So, what's the fix?

You need to clearly outline both the initial pain and the end results. What are the costs of getting started? Speak in terms of time, effort, and capital expenditure.

And then hit the *rewards*—and hit them hard. Show them the clear ROI on taking that initial small bit of action.

A lot of times the problem is that the buyer can't fully see the benefits of working with you. Once they do, they'll often suddenly understand that the reward of a bit of upfront work is well worth the effort.



03. Increase Cost of Inaction

After tackling the initial costs, it's time to hit the costs of inaction.

Why Does It Hold Buyers Back?

Sometimes the problem is that your buyer just isn't looking at the long-term picture.

Sure, doing nothing feels fine *now*. But how does not acting play out over the course of months, quarters, and years?

In most cases, the costs of inaction go up.

Slowly at first. But then it grows *exponentially* after a certain point.

And if your buyer doesn't see the true costs of inaction, they won't be likely to spend today.

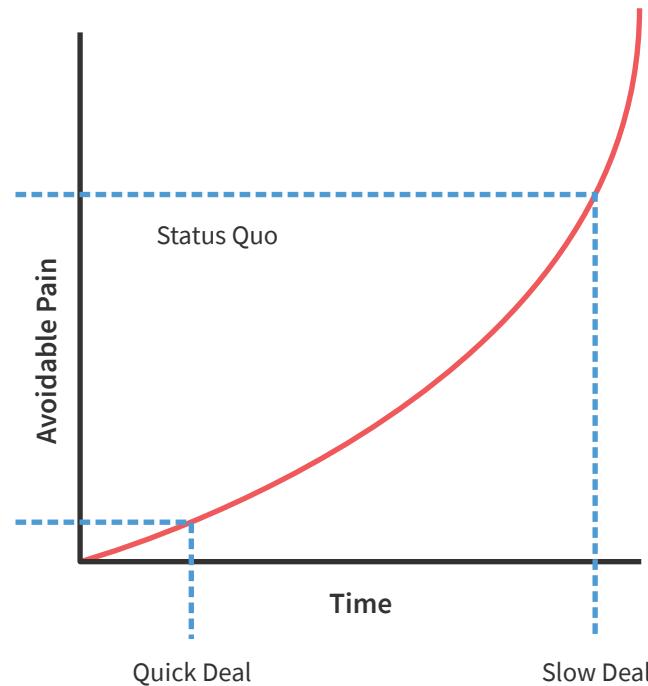
Why Is This Belief Important?

Without an increase in pain, there is no urgency to make a decision.

Your solution isn't just about offering a benefit. It's about eliminating a cost.

That cost might mean keeping up with consumer expectations. It might mean staying competitive in an ever-changing market. And if your buyer doesn't see those costs, then they won't have the urgency to act now.

So it is your job to make the cost of inaction clear to the buyer.



Objections to Listen For

These objections revolve around the buyer delaying their purchasing decision:

I want to think about it.

Send me some info.

I want to do some research.

Let's circle back next quarter.

How to Eliminate This Status Quo Belief

There are two things you can do here.

First, encourage the buyer to share what will happen if they take no action. Here you can guide them through the consequences. And then, get them to rank the priority of solving the issue—if no action was taken vs the other things they are working on implementing.

You can also help the buyer understand the *second-order consequences* of not acting.

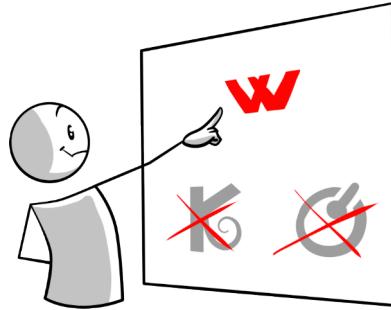
Second order consequences are the consequences that come about because of previous consequences. Or in other words, it's the “snowball effect”.

For example:

- They don't train their sales team (1st order).
- Consequently, the CEO must let some of the staff go because of the missed sales quotas (2nd order).
- Everyone else's sales targets become bigger and unmanageable (3rd order).
- Training is now not enough to solve the problem as the goals have become impossible to attain even *with* training (4th order).

See how that works?

The bigger the cascading effect, the better you can communicate this to the buyer, the higher their urge to act will be.



04. Reduce Options

Next up is common one—for a lot of B2B purchases, there are too many solutions to choose from.

Why Does It Hold Buyers Back?

Buyer overwhelm is where the buyer feels like they can't figure out which solution is

right for them because of how many choices are out in the market.

So instead of just deciding on one, making the purchase and getting the solution implemented. They do nothing. They feel paralyzed.

This can also happen if the buyer has *tons* of different priorities they're juggling. And with so many balls in the air, they can't focus on solving a single problem (even if the solution to each one is obvious).

Why Is This Belief Important?

If you run into a buyer like this, they're going to be so unsure of who to commit to that they'll *wait* until a winner becomes clearer. Rather than playing an active role and spending their time differentiating between the options, they'll default to a passive role.

This is of course a problem. Why? Because if everyone is similar, the winner won't ever become clear on its own!

Objections to Listen For

How do you spot someone with this belief? Look for objections like these:

Let me think it over and I'll get back to you.

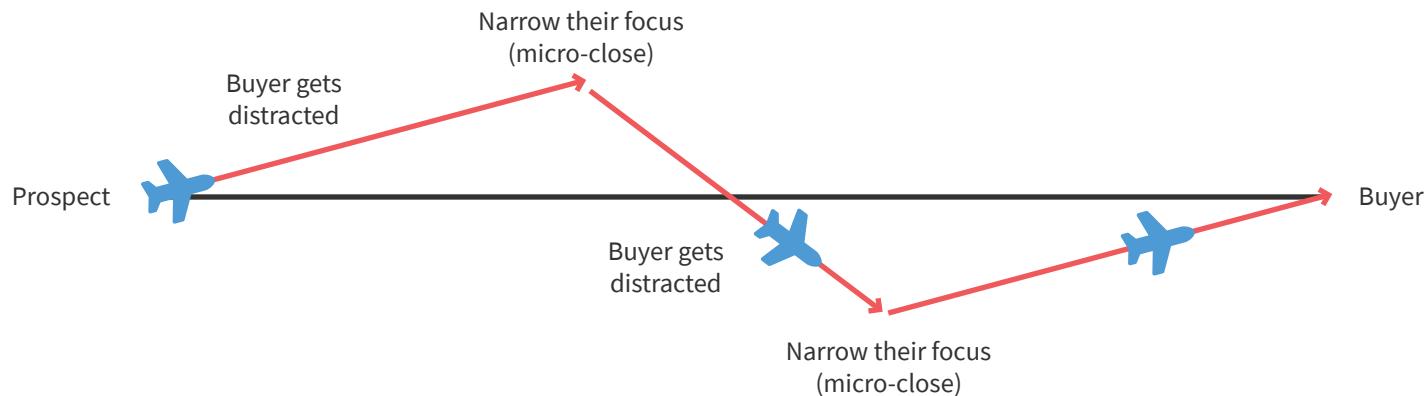
I'll have to take a look at the other options.

How to Eliminate This Status Quo Belief

To eliminate this belief, you need to encourage the buyer to explain what they think are the potential solutions to each of the problems they are facing.

And then, nudge the buyer to narrow their focus to specific products, features, or benefits of *your* product that make it the only solution that's appropriate for them.

You may have to do this repeatedly across the entire buyers journey.



Think of this process like trying to keep a deviating plane on course. A few degrees off in the wrong direction and the plane might end up on the wrong continent given enough time.

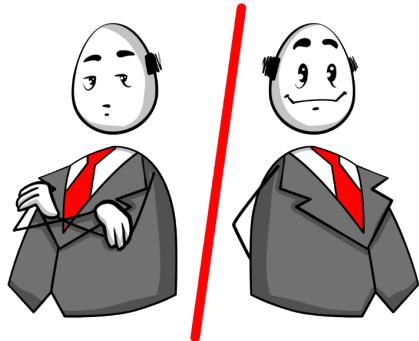
But with regular checks to it's heading, it can get back on track with relative ease no matter what direction the environment around it is trying to edge it.

Similar, every time the buyer moves off course, bring them back on track by narrowing their focus to whatever will get them one step closer to their ideal future reality.

We will cover “micro-closing” in the Closing Framework at the end of this book. But micro-closing throughout the entire sales process dramatically reduces buyer

overwhelm and also a number of other elements of status quo too.

Close the buyers options early and often and you'll smooth our their buyers journey whilst reducing the sales cycle length too. Win-win.



05. Kill Confirmation Bias

Next up is “Confirmation Bias.”

Why Does It Hold Buyers Back?

Confirmation bias is the mind’s tendency to stick by its previous decisions and defend them, even if there’s strong evidence that they were wrong.

We’re all guilty of this. We dig our heels in when someone pushes back with an incontrovertible fact. We fight for our position, even if in the back of our heads we know that we might not be 100% right.

It happens! We’re all human.

This tendency of confirmation bias exists to protect our self-image and our ego.

Why Is This Belief Important?

If for example a buyer believes that their objectively bad previous decision to work with a competitor, was not a mistake, they won't ever correct course. Instead, they'll just stick by their first decision to the very end.

Ultimately, that means they will believe that they have *no need* for your solution.

Objections to Listen For

This one's easy to spot. Look for:

I'm happy with our current supplier.

I think the way we're doing things right now is good enough.

How to Eliminate This Status Quo Belief

Breaking through the belief of confirmation bias takes some tact.

Ask the buyer for evidence that their current solution is working. What are the numbers they're judging their effectiveness by? Be careful how you word things here as pushing too hard will push the buyer to be defensive.

But if you can get some hard data from them, start comparing their current numbers to what you know is *possible*. What metrics could they achieve with your solution? And then finish up by asking if they believe there *could* be a better alternative to what they're using now.

“

In order to get people to share more information, number one, encourage them to protect their self-image. By far and away, **that's the biggest piece.**”

”

Michael Reddington, President of InQuasive, Inc. & Certified Forensic Interviewer, Salesman.com Podcast.



06. “We Can Do It Ourselves”

Status quo belief number six involves a bit of naïve pride—it’s the “We Can Do It Ourselves” belief.

Why Does It Hold Buyers Back?

Sometimes (especially when you’re dealing with smaller businesses), you may run into buyers that think they can solve this problem themselves.

Now, in some cases this might be true. If you’re selling a time-tracking software that keeps tabs on the efficiency of employees, a small business owner might say they can just track their employees on their own.

And they’re right!

They *could* do that without your help. But the tradeoff is time. Do they have the time to do it on their own? Is that trade off effective for them? Can they do it as well as you?

The answer is usually “Probably not.”

Once the buyer decides to do it themselves (if they ever do), only *then* do they understand they’re in over their head.

The problem is by that point, they’ll have forgotten about you. And the sale is already lost.

Why Is This Belief Important?

If the buyer thinks they can solve their problem on their own, they won't be *tempted* to buy from you.

Objections to Listen For

How do you spot this status quo belief? Look for:

I can do it on my own.

I think the way we're doing things right now is good enough.

★ HINT:

Communication is hard. You think something, it gets translated to words, typed on a screen and then sent. The buyer then has to read the words (probably on a completely different device than what you sent it from), translate those words into their own understanding of the world and then make a decision based upon them.

Therefore, the simpler you can make your explanations of your value, product and implementation the better. Take your ego out of things, don't try and look smart.

If you buyers don't understand what you do, they can't possibly agree to implement it.



How to Eliminate This Status Quo Belief

To eliminate this status quo belief, we need to build two beliefs:

1. Belief that the buyer can have their problems solved.
2. **BUT** it's not such a simple fix that the buyer can resolve the issue themselves.

The buyer understand their current reality. They see their future reality. And they know fixing their problem is doable... but it'll take some expertise to get it done right. Your job is to balance the complexity of a problem with the reality that it can be solved with the right expertise.

When a buyer believes these two ideas, they're in what we call the "buying zone". This is where deals get done fast.

To do this, explain the solution in ways your buyer can easily understand. But at the same time, be sure to highlight your expertise, patented solution, unique software, and catered value proposition along the way.



07. The Trust Barrier

The last belief that holds buyers back from getting deals done and moving swiftly through the sales pipeline is the trust barrier.

Why Does It Hold Buyers Back?

There are three questions that the buyer is constantly asking themselves when searching for a solution to a product.

To get a deal done with the buyer, you need to satisfy each of these questions.

If the buyer is even a little hesitant to your responses to the trust questions, they'll never get the contracts signed.

1 *Are you telling the truth?*

2 *Is your company reputable?*

3 *How is this solution any different from what I've done in the past?*

“

Identify the precise cause of the problem because you want them to know you know why it happened because then that increases their confidence **that it won't happen in the future and that you can fix it.**”



**Tim Riesterer, Chief Strategy Officer
of Corporate Visions**, Salesman.com Podcast.

Why Is This Belief Important?

If you fall short on any of the three trust questions, your buyer won't trust you enough to make a purchase.

Building rapport and cultivating a deep understanding of the first 6 status quo beliefs builds trust in YOU. So that crosses off number one on the list.

Telling stories and showing social proof (case studies, testimonials, 3rd party endorsements) all build trust in the company.

But unless the buyer believes your product is going to be unique and superior to what they've tried in the past, **they just won't buy.**

Objections to Listen For

Objections to look for here include:

I tried something like this before.

We're going to go with a cheaper provider who's offering the same service.

I don't think this will work for me.

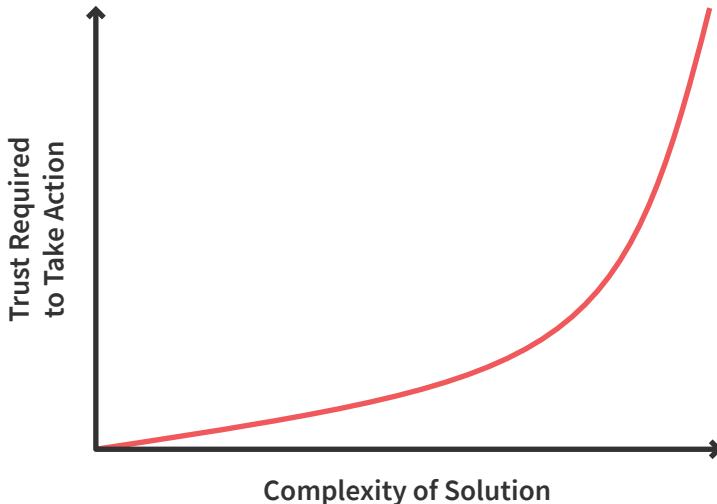
This sounds great but this is what the last salesperson told me.

How to Eliminate This Status Quo Belief

So, how do you help make the buyer trust that your solution is different?

By making your solution easier to understand.

The better you are at explaining your product, the less trust it'll take to convert your prospect into a buyer.



To do that, you need to focus on two goals:

1. Explain why they've failed in the past.
2. Show them why this is going to be different.

For example, let's say you're selling sales training to a VP of sales who has never used an external sales trainer before. Your goal should be to point out:

1. **Why they've failed in the past** - they've never been given a proven sales process to work from.

2. **Why is this going to be different** - Salesman.com Academy will give them the step-by-step frameworks and group coaching calls they need to get a proven sales process implemented in 30 days or less.

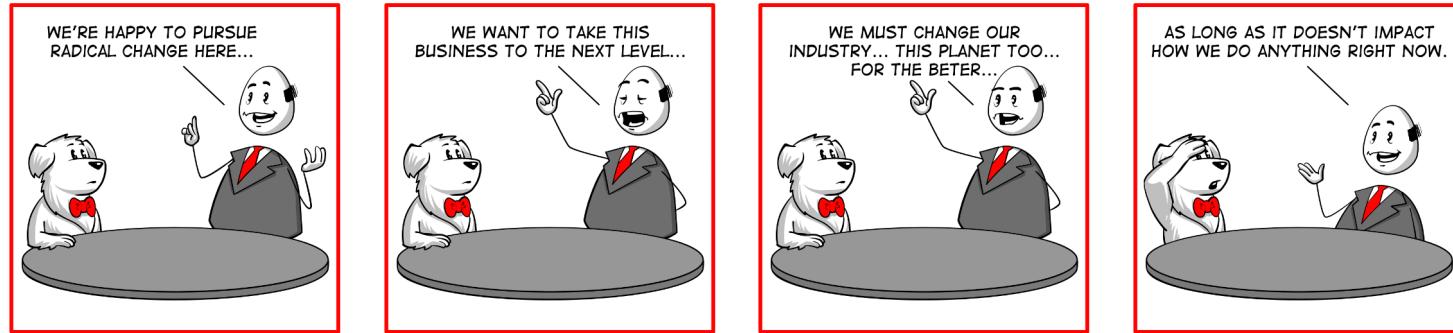
It's important to note that you aren't selling your **product**. Instead, you're focusing on the **method** of success.

- The sales training and mentoring program (product) works because it leverages step-by-step frameworks

and coaching calls (method) to get everyone up to speed quickly.

By focusing on the method first and then selling them on your product, you're reducing the complexity of your solution.

And that lowers the trust barrier you need to overcome.



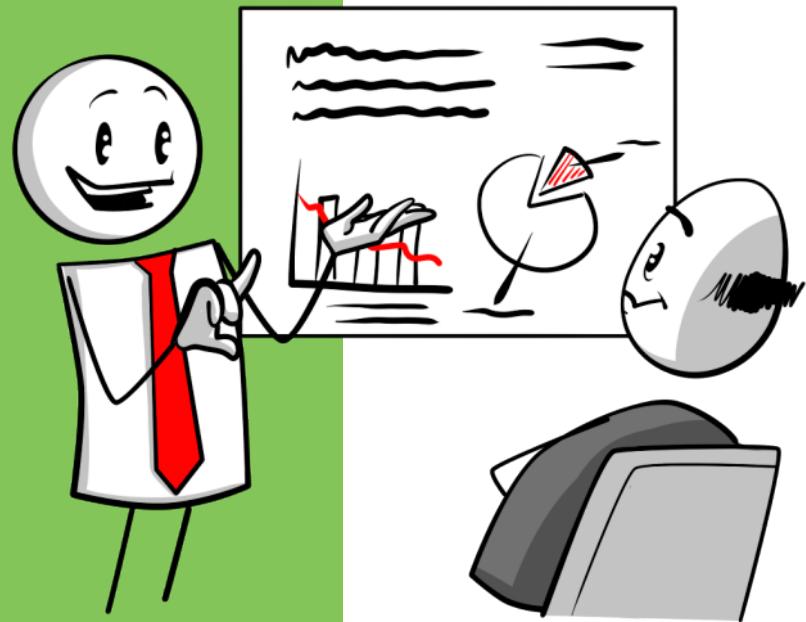
Wrapping Up

When you're trying to close a sale, sometimes it's not your competitor that you have to worry about. It's the status quo.

Because even in the world of B2B buyers, when you're often dealing with professional

purchasing groups, they're still human. They still get stuck with the 7 elements of the status quo and you need to be the catalyst to help them get unstuck and start driving momentum towards getting to their bigger, bolder, brighter future reality.

II. Product Demos



Product Demos

If someone doesn't believe a tool can solve their problem, they'll never use it.

It's the same with your sales demos. The goal with a sales demo isn't to teach the buyer how things work, but to help them believe the product will work for them.

Sam would run through every single feature of his product on his demos. Unfortunately, it took hours and wasn't effective.



Walter only had time to run through the key features on his sales demos because he has so many meetings booked in his calendar.



Walter gets agreement on the most critical parts for the buyer, covers them, and gets confirmation that if the buyer used the feature, it would solve their problem.

Sam shifted to Walter's way of doing sales demos, dramatically reducing the time they took to complete, and he closed more sales on the back of the change.

This chapter explains how to conduct a demo that helps your buyer understand why your product is the only solution they need to solve their problem.



Sales Demo Framework

In sales there's usually a lot of lip service going on.

Overselling product features, exaggerating capabilities, embellishing underlying technologies—it all happens. And it happens a lot.

But if there's a single thing you can do to cut through the fog of uncertainty that your buyers are facing, it's to demonstrate your

product in real time. That's where the sales demo comes in.

A sales demo is one of the most powerful tools in your sales toolbox for getting buyers to say “I want that now!”

That is, as long as you run your sales demo *right...*

This chapter explores a proven framework for running a successful sales demo. You'll learn how to maintain control, set expectations, zero in on buyer needs, leverage social proof, and close the deal.

What Is a Sales Demo?

A sales demo is a demonstration of your product in front of a potential buyer. These demos used to be done in person. But these days, most demonstrations take place virtually over conferencing tools like Zoom or Teams.

For some, a sales demo might lead to closing a deal on the very same call. For others, it might be a critical step that leads to further meetings with end-users and decision-makers.

In either case, the more effectively you present your product (and the more you cater your presentation to the audience), the better your chances of closing will be.

What Is a Sales Demo *NOT*?

There are a few misconceptions about what a sales demo should look like. So let's dispel those myths by identifying what a sales demo is not:

A scripted presentation

Sales demos should be flexible, fluid, and guided by an outline rather than a word-by-word template.

Boring

Sales demos should keep buyers engaged using questions, multiple mediums, and an audience-focused approach.

Long

A demo last for less than one hour and a good rule of thumb is to aim for 30-45 minutes.

A full feature run-thru

Demos should cater to the specific needs of the buyer on the call and only highlight features, benefits and end desires that matter to that specific prospect.

Key Points About Demos

Now, demos seem like they should be very straightforward, right? Just pop the product up on a screen, show the buyer how it works, and wait for the deal to get done.

Not so fast. There's more to sales demos than meets the eye.

If you want your demos to really resonate with your buyers, then you need to remember a few key points about this deceptively complex process:

The Goal Isn't Always to Close

The ultimate goal of your sales demo is going to depend on your unique sales cycle. For expensive and complicated products, a sales demo's goal may be to book a follow-up call to discuss budget, tech specs, or other business use cases (not necessarily to sign on the dotted line).

The point is to move prospects on to the next stage of the buyer's journey. It's up to you and your organization to determine what that is.

Shut Up

Most sellers talk too much during their sales demos. And that's a shame. Because from start to finish, your buyers are likely going to have plenty to say about what it is you're presenting. And that can make hitting the *right* pain points much easier. So rather than talking away the entire length of your sales demo, make time to engage with your buyers. Ask them if the information is resonating. Use confused looks as an opportunity to clarify. And above all, get your buyers reaction to what you're saying.

Demos Cross the Reality Gap

A demo isn't just meant to show buyers what your solution can do. It's meant to help your buyers imagine what it'd be like to get your solution implemented. How does the interface feel? How much easier is it to jump from one function to the next? What does implementing this change mean for them? So be sure to get your buyers engaging with your product directly whenever possible.

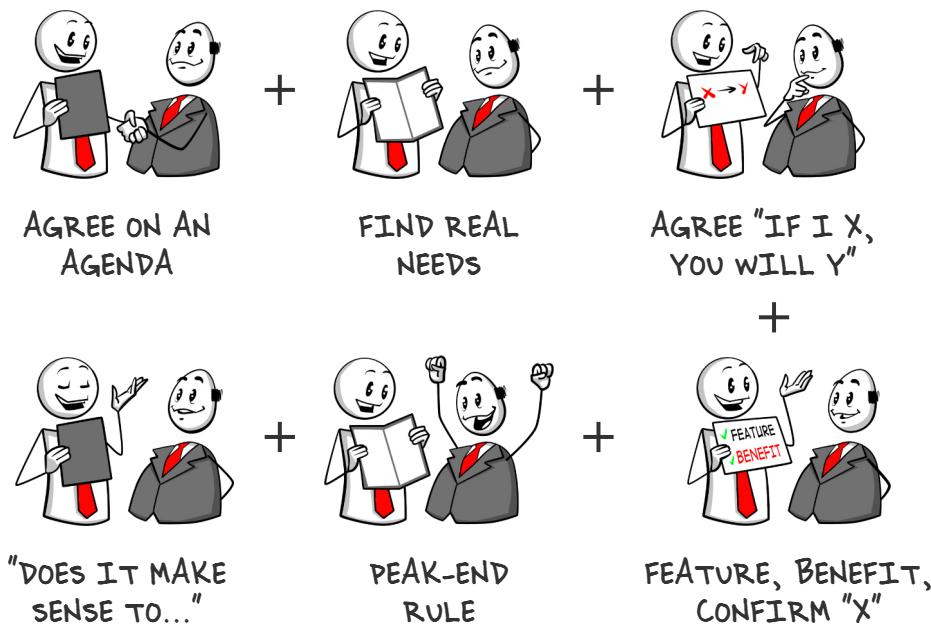
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Why do we do demos? The reason we do demos is to show the person what the screens are going to look like, show them how easy it is to click through the screens, show them what they'll be able to accomplish. Now, the best software demos, by the time the demo is done, you're envisioning your content in the demo. **You're envisioning how this will make your life easier.”**

Joey Coleman, Customer Experience Expert & Wall Street Journal Best-Selling Author, Salesman.com Podcast.

The Sales Demo Framework

Now that we've nailed down what a sales demo is and isn't, let's look at how to structure a sales demo and what you need to do to make it end in a win:





01. Agree On an Agenda

The first step to a successful sales demonstration is setting an agenda. An agenda establishes that you're in control. And it gives the buyer an idea of what you're going to cover and when you're going to cover it.

You should always send out a rough agenda ahead of time. But you'll also want to take a minute or so to run through the full agenda again when the call begins.

The “I Must Have This Now” Scenario

Ideally, you'll know exactly what the buyer wants to learn about before the sales demo begins. This should be uncovered on the previous diagnosis call. That way, you can come prepared to cover that material while also having a strategy that triggers an emotional “I want this now” response.

Laying out the agenda might sound like this:

The goal here is to get the buyer to verbally agree to your plan. This puts you in control.

Hi, I'm looking forward to running through our demo with you. I know you want to look at [FEATURE], and so we'll go through that first.

These demos are a conversation though and so please do stop me if something piques your interest. How does that sound?

HINT:

Remember that your sales demo should not be rigid. It shouldn't be a scripted. Instead, you're using buyer input to **redirect** the conversation to discover the pain points, benefits, and features that interest them the most.

Even if you are in control of the conversation, going with the flow can be tough at first, especially if you're not used to it. But the better you become at keeping the demo dynamic, the more likely you'll be to hit the points your buyers actually care about.

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First of all, they (good salespeople) **don't plan ahead for every single question that they're going to ask.**

If you script your questions, you might as well not have your buyer in the passenger seat, navigating at all."

Deb Calvert, President of People First Productivity Solutions, Salesman.com Podcast.

99

The “You-They-We” Rule

You may run into buyers who want to be in control of the call. This can cause problems later in the demo if they try and derail you.

That's why you always want to think of the sales demo in terms of the You-They-We rule:

YOU are leading them down the path of what **THEY** need to learn so that **YOU** can get what you want.

Once you've laid out the agenda, ask a the question:

How does that sound?

This should be an almost rhetorical question. We're asking the question so that the buyer falls into our frame and agrees to let us take control.

If they push back and say something like:

Well, I'm only interested in hearing about [X].

Or...

I just want to know your pricing and ask some questions.

Then you need to reestablish control. We can do that by saying:

OK great, we can cover that in a second. The way these demos usually go is that...

And then repeat what you think the buyer needs to know to make a purchasing decision. This is most common with executives who aren't used to not being in control.

I've been in situations where I've been through this loop multiple times before the buyer fell in line with the way the conversation is going to be ran.



02. Find Real Needs

You should already be entering the demo with a solid idea about what the buyer desires from your product from your diagnosis call. This is your working hypothesis, and we're going to be gathering evidence to back it up throughout this demo framework.

That being said, it's still worth investing just a minute or two of discovery to refine that hypothesis at the top of the demo. Here, we're asking the buyer just a few questions before getting into the actual demo.

This accomplishes a couple of things:

- It shows the buyer that this demo isn't some cookie-cutter, generic presentation you give to every single prospect. Instead, you're demonstrating that you're catering it to their unique needs and wants (great for building rapport).
- It lets you refine your messaging so you can take the buyer to what they want quicker and more effectively. This will save both you and the prospect time.

☆ HINT:

You don't need to take too long on this step—just a few minutes should cover it. But in that short time, you can learn an enormous amount of info that'll help you cater the demo to the buyer's specific needs. And that means you can avoid features they don't care about and offer the right information that helps them make an informed decision.



03. Agree “If I X, You Will Y”

With knowledge of what the buyer truly wants, it's time to make a deal with them: If you can provide a specific benefit with your product, will they be willing to move forward with the sale?

Cover the major points you discovered in the previous step. If they're concerned about, say, implementing a new accounting system without dramatically altering their processes, focus on that in the agreement. And get them to verbally state that if you prove that won't be a problem, they'll then move forward.

Ask the buyer:

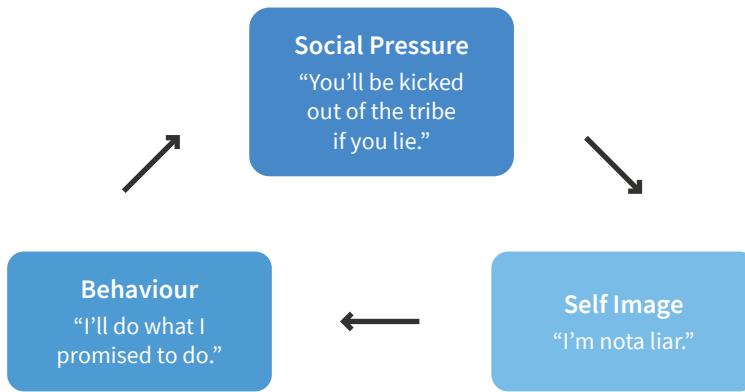
If I do X, will you then do Y?

When I'm selling Salesman.com Academy I like to ask the question:

If I run through the training platform and you agree that the step-by-step frameworks and coaching calls would help your team find and close more sales, will you make a decision whether you want to move forward, or not, by the end of the meeting?

See how we're staying in control of the demo here?

Now, as long as we can legitimately show the buyer how we can solve that issue, they're locked into either moving forward with the deal or going back on their word. And thanks to the power of social pressure, that's not unlikely to happen.



The Power of Social Pressure

When it comes to making deals, everyone involved has an image of themselves that they try to stick to. Maybe they're honest businessmen. Or maybe they're logical decision-makers.

Whatever that self-image, people don't like to shatter it. In fact, they'll be willing to go to great lengths to avoid doing so. This agreement of "If I X, will you Y?" plays off that tendency.

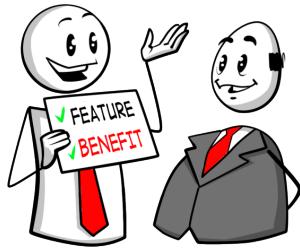
The point of the "if I X, you will Y" agreement is to set you up to close the deal.

Too many sales demos are given to half-interested buyers who may or may not have a reason to buy. But when you get the buyer to agree to move forward, on the back of the needs that they've told you they have, you build a lot of social pressure for them to comply.

HINT:

This step can feel a bit scary at first. Rather than fixating on the fear of making this essential ask, focus instead on setting a goal. "I will make the ask every demo."

The more you make the ask, the more you'll naturally start feeling more comfortable doing so. Eventually, you'll forget that it was scary to begin with.



04. Feature, Benefit, Desire, Confirm

Alright, with the groundwork of success finally laid thanks to the agenda, needs rediscovery, and agreement, it's time to get into the demo.

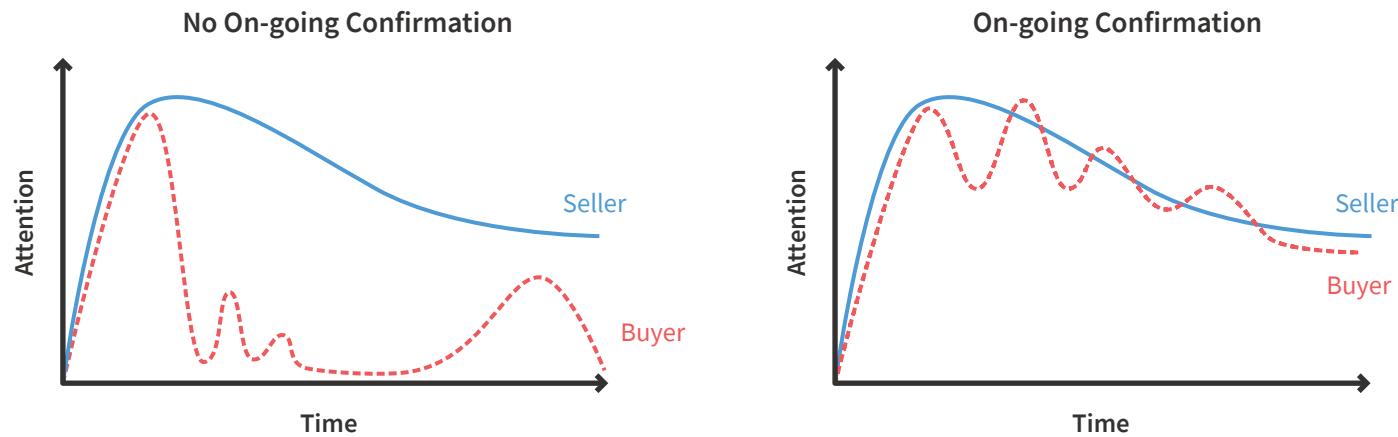
Rather than starting at the top of the page and running through a list of generic features, you need to take everything you've learned so far and push the buyer through

the feature, benefit, desire, confirmation loop.

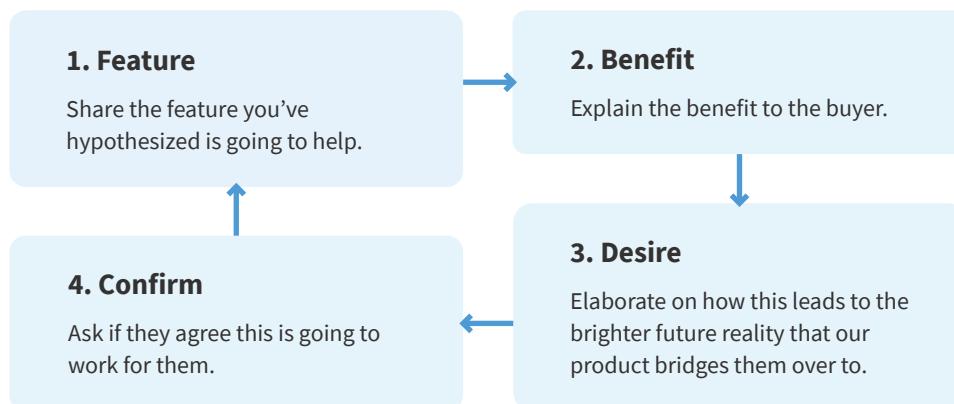
Once you have completed one loop, you move to the next feature and you run through the process again.

This turns your demo from a boring, one way monologue, where the buyer slowly loses the will to live...

Into a meeting where they're agreeing that they're interested all the way through it.,



Here are the four steps:



At the End of Each Loop

If the buyer says “yes,” then make a note. This is the information you’re going to wrap up and close the demo with later on.

If they say “no,” then ask them why they didn’t think this is the case and shift your hypothesis accordingly.

Here’s an example:

1. **Feature** – “Here’s an example of one of our proven, step-by-step frameworks.”
2. **Benefit** – “It will help your team build an effective sales cadence so that they can book more meetings, like clockwork.”
3. **Desire** - “You can then spend less time shouting at them for a lack of activity and more time coaching them which you said is your favorite part of the job, right?”
4. **Confirm** – “Cool. Do you think that our frameworks will help you do more coaching with your team?”

Through this process of working though the feature, benefit, desire, confirm loops, you’re continually refining your hypothesis of what the buyer actually cares about.

What are the features they’re responding to? What are the ones they don’t seem to care about at all? What does that say about their pain points, their goals. And so which sales strategy is going to work the best to close them?

Along the way, you should continually shift and reevaluate your hypothesis of value to make to make sure that the buyer feels like you’re capable of getting them to their desired future reality.

★ HINT:

If it makes sense in your sales process, try to get your buyers to share their problems firsthand. This is especially effective when you’re dealing with software.

Ask the buyer to share their screen, open their CRM, accounts or where ever they can show you their issue directly or maybe the numbers behind it.

“

So that is a rule for all our demos. They always share their screen and have them show the current process and the problems **so that you reactivate that pain and you're in a good situation to lead the meeting.**”



Nicolas Vandenberghe, CEO of Chili Piper,
Salesman.com Podcast.

The the feature, benefit, desire, confirmation process accomplishes two things.

1. It lets you better understand the buyers pain points. And that means you'll be in a better position to solve their problem.
2. Additionally i also creates a more visceral need in the mind of the buyer. They have to relive the frustration of the pain point in their conversation with you. And that is going to make them all the more likely to want to solve it.

Be Strategic

You're going to want to start with the most important feature you think the buyer is going to be most interested in. This is the idea you've been zeroing in on during the previous three stages of the framework.

From there, hit the other features you think could benefit the buyer, based on previous demos with similar ICP's and your own industry knowledge.

But be strategic here too. Highlighting too much is going to be a waste of both your time. Additionally, there is absolutely no reason to run through everything your product has to offer.

In fact, if the person you're doing the demo with requests that, they're probably not the decision maker. They're more likely to be an end user and so with that understanding you can judge how much time it's worth giving them.

☆ HINT:

Don't let a "no" dishearten you during your demo. A negative answer (especially during this feature, benefit, desire, confirm stage of the demo) will only help you refine your hypothesis of value, so you can hit key points that really matter to the buyer later on.



05. Peak-End Rule

Studies show that people tend to remember two parts of an event: the peak moment (the emotional high) and the end of it.

The majority of everything else is likely to be forgotten. This is why you should keep your demos on the shorter side.

It falls to you, to make sure that there is a specific peak moment during the demo and that it is memorable.

More than likely, one of the times that you run through the feature, benefit, desire,

confirm loop with will be the most emotionally intense part of the demo for the buyer. Therefore, it's the part of the demo that is most likely to be remembered.

If you notice this peak moment happen in real time (it's usually a surprised and happy face or they give you a comment like "wow") during the demo process, note it down. You can bring the buyer back to this peak moment in the future by reminding them of the experience that they had at that point in the demo.

★ HINT:

When trying to deliver your peak moment, acknowledge and encourage anything that makes the buyer say one of the following:

- "If I signed up, it means I could also do..."
- "I didn't think you could do that."
- "If [X] could do [Y], then I would have [Z]."

You're looking for a shift in their belief system or worldview where they now believe that something new is possible (if they work with you and buy your product).



06. “Does It Make Sense To...” Close

The final step of the demo is confirming that we've shown the buyer what they need to make a purchase.

We cover this in detail in the Closing Framework that you'll read shortly. But in the mean time we can look at how to transition to a close.

You create a natural transition to move from sales demo to close, by asking an open-ended question like:

Is there anything missing from what I showed you that you think you need to hit X goal?

Was there anything specific there that you didn't realize was possible before?

Is there anything else that we would need to cover before you could make a decision whether to move forward or not?

“

If you fail to make a sale, what you've got to do is go back to your office, sit down by your desk, analyze the sales call, and don't say, 'Why didn't the prospect buy from me?' What you've got to say is, 'How could I have gotten the prospect to say yes?' Too many salespeople put the blame on the prospect and not on themselves. **And they fail to learn from their rejection.**"

**Harvey J. Eisenstadt, Award-Winning Sales Consultant,
Trainer, Speaker, Mentor, & Author, Salesman.com Podcast.**

Sales Demo Best Practices

The Sales Demo Framework is the best way I know to run demos having both done thousands of demos myself and from working with over 2,000 sellers in Salesman.com Academy.

But even still, here are a few more things you can do to put the odds of winning even further in your favor.

Do It Live

Pre-recorded video can work great but they're never as effective as engaging with your buyer in-real time on a call.

Stay Flexible

Flexibility is key during your demo.

For instance, if agreed in the agenda to cover a specific set of features, but the buyer is pushing to see others, as long as it's moving them closer to a sale, it's fine to deviate from the plan.

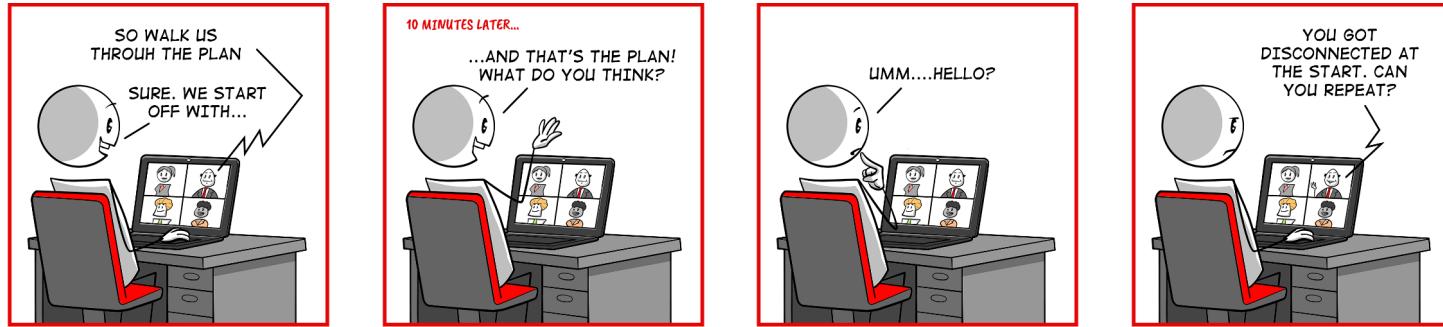
They're giving you a window into what's going to help them make a buying decision.

Keep Prospects Engaged

Don't think of your demo as a presentation. Instead, think of it as a conversation.

When you follow the framework, there's going to be plenty of back and forth along the way. But you can also ask if they have any questions, inquire about how they might use such a feature, or question how their current solution compares.

The more engaged your buyers are, the more likely they'll be to retain the information you're giving them.



Wrapping Up

Contrary to popular belief, sales demos shouldn't be a linear, pre-prepared presentation. They shouldn't just be walking through a long list of features. And they shouldn't have a rigid, unchanging script attached to them.

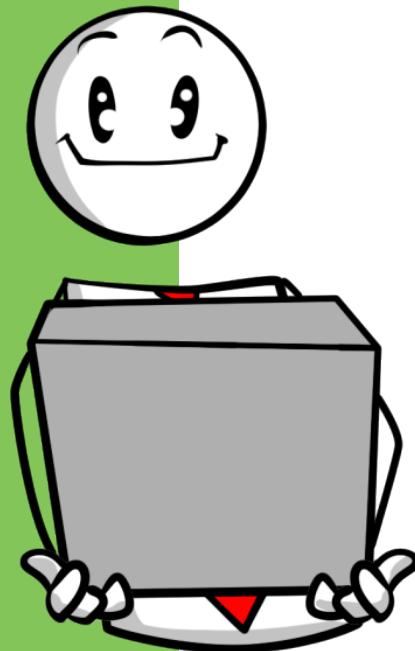
Instead, a sales demo should be a continuous refining of your hypothesis, covering the aspects of your product that are most

important to your buyer. They should also include a variety of logic-based questions that gradually lead your prospects to the realization, "I want this!"

When you follow these simple steps, buyers will leave your demos enthusiastic, deals will close more quickly, and you will start busting through your quotas faster than ever before.

12.

Upselling



Upselling

People assume things have stayed the same if they don't notice a change.

It's the same in business. If you can communicate how things have changed since the buyer first made their original purchase, the chances of them making additional purchases dramatically increase.



Sam asked his prospects if they needed anything else from him a few months after they became a customer. They would always tell him they're OK with what they've got.



After a meeting with Christopher, who explained how their market would change over the next few years due to new technology, Sam started explaining to his customers that their needs had changed since they initially purchased too.

When Harry understood that what he bought from Sam didn't fix all the new problems he was now facing because of his own company's growth, he was happy to move to a higher-tier product.

This chapter shares how to explain to your buyer that their market has changed since their original purchase so you can sell them a higher tier product.



Upselling Your Current Buyers

What part of your job as a seller do you enjoy the least? If you're like most sellers, you probably said prospecting. All the cold emails, the endless follow-ups, the calling, and the relentless slog of "no" after "no."

Whilst prospecting for new business is integral to your sales success, if you've already have a long list of *current* clients, there might be easier avenues to revenue sat right in front of you.

Often it's easier to upsell your current buyers to a larger services than to bring on new customers. And when you do upsell your current buyers, you can drive more revenue, greater client loyalty, and higher commissions than purely trying to close new logos.

66

We all know the stats that show how hard it is to get a new customer compared to keeping your existing ones. So if you show genuine curiosity in how things are going with existing clients, it means you've got to spend less time scrapping about creating content, less time making cold outreach because you're maintaining your existing customer base through being genuine through being passionate about their outcomes, **which in result, is going to help you hit your quotas or break your quotas and obviously make more commissions.**"

Interview Sam Dunning, Marketing Expert

What Is Upselling?

First off, let's settle on a definition of upselling.

Definition: *To encourage current buyers to purchase a more expensive, upgraded, or superior version of the product they have now.*

Simple, right?

When you convince your current buyers to purchase a newer version, you're offering an upsell (meaning a better version than what they're using today).

This, of course, deviates from the normal routes of prospecting (i.e., attracting new buyers) because it focuses on your existing customers instead.

Some examples of upsells include:

- Higher tier membership offering better support.
- Different models with added features.

- Premium packages with more products included.
- Added product warranties.
- Increased personalization.

Upselling vs. Cross-Selling

Upselling is often conflated with cross-selling. But in fact, the two are different. Let's take a look at the definition of cross-selling:

Definition: *To effectively encourage current buyers to purchase an entirely new product, usually on the basis of the product they have now.*

Rather than getting an *upgraded* version of a product, they're getting a new one entirely.

Let's look at an example.

Lets say that a sales leader has two of their sales team enrolled in Salesman.com Academy. I then connect with the sales

leader, show them the before and after results of their sellers performance having worked with us and then nudge them to get their whole sales team on board.

That is an upsell.

Another route to drive more revenue from the account would be for me to sell the sales leader a training program for leadership.

That is a cross-sell.

See the difference?

For the purposes of this framework we're going to put both upsells and cross-sells under the blanket term of "upsell." After all, both add up to greater customer lifetime value and carry the same benefits.

Why Upsell?

Now that we've got a better handle on what upselling is, the question becomes, "Why do this at all?" I mean, why work on a whole new process to bump your existing buyers to spend more with you, when you could just add new buyers to your cadence and close them instead?

There are four main reasons why upselling often beats out traditional prospecting.

1. Easier than finding new prospects.
2. Drives more revenue.
3. Instills greater loyalty.
4. Enhances personalization.

1. Easier Than Finding New Prospects

First and foremost, driving new sales from *existing* buyers is substantially easier than closing deals with new prospects.

The fact that you've already earned the trust of these buyers. You've got them to purchase. You've delivered on your promises. And because of it, your buyers assume investing more resources in your products is going to deliver additional value.

But with new prospects, you've got to do all that heavy lifting of building rapport, demonstrating product value, and persuading them to make room in their budget from scratch. And as you know, that can take a lot of work.

Here are some stats:

- Prospecting and qualifying leads are the top challenges for at least **1 out of 3 salespeople** (HubSpot).
- You have just a **5 to 20% probability** of successfully selling to a new prospect in most industries. If you're selling to an *existing* customer, that probability jumps to **60 to 70%** (Marketing Metrics).
- It cost **5X as much** to attract a new customer compared to retaining an existing one (Invesp).

When you put your efforts into the buyers you already have, you're bound to close deals *much* easier than trying to close new logos.

2. Drives More Revenue

When you work with existing buyers, you're going to drive more revenue (and earn higher commissions) than seeking out new leads.

As it turns out, returning buyers are much more likely to spend more with you than brand new prospects.

Here again, the issue is trust. Will investing \$15K net an actual return in performance or revenue? Or will we lose money on this deal?

For new prospects, you're still considered a risk. But for existing ones, the issue is settled because they've already seen results with your products. And the trade-off (resources invested=more value received) is clear.

Let's look at the numbers that prove why existing customers drive more revenue:

- Repeat customers **spend 67% more** on purchases than new customers (BIA).

- Nearly **2 out of 3 businesses** with strong customer loyalty make more money from these customers than it costs to retain them (Aspire Power Solutions).
- Increasing customer retention by just 5% drives a **25 to 95% increase in profits** for businesses (Invesp).

It isn't just easier to work with existing buyers then. It's also much more profitable.

3. Instills Greater Loyalty

The more you can get current buyers to invest, the more likely they are to remain loyal—provided you follow through on your promises, of course.

Customer loyalty is a massive driver of long-term sales success. It opens up the “land and expand” strategy that we cover at the end of this chapter too.

Here are a few stats to show just how important loyalty:

- **4 out of 5 customers** make their purchasing decisions based on how much they trust a brand (Forbes).
- The overwhelming **majority of customers** (77%) are considered brand loyal. Of these, 37% regularly make repeat purchases with the company rather than the competitor (Facebook).
- **Most customers** (56%) stay loyal to a brand that “gets” them (SmallBizGenius).
- **1 in 3 customers** will never buy from a brand if they've had just a single bad experience. This is also one of the top reasons why companies lose business overall (Oracle).

4. Enhances Personalization

Finally, when you upsell your current buyers effectively (using the framework that follows), you demonstrate that you understand their needs. You *get* them. And you can then start to offer a more personalized solution to their issues.

If the deals with your current buyers are big enough they can request product feature changes or spend time with your executive team. You will naturally want to spend more time in the account when they're a bigger chunk of your commission bonus too.

This leads to a certain level of “lock-in” where it becomes increasingly difficult for a competitor to come in and take the business from you. So the buyer is happy with their personalized service and your organization can treat them more like a strategic partner rather than just a generic name on a purchase order.

- **Nearly all (99%)** marketers agree that personalization helps advance customer relationships, with **78% claiming** it has a “strong” or “extremely strong” impact (HubSpot).
- Only **13% of customers** believe that a salesperson can truly understand their needs (Brevet).
- More than **2 out of 3 (69%)** buyers report that the best way to make the buying experience positive is by listening to their needs (HubSpot).

Clearly, there are some very real (and very lucrative) benefits to upselling your current buyers.

But let's face it, no one likes change. And unless you can really *sell* an upgrade, you're likely to hear a lot of “Thanks, but no thanks.”

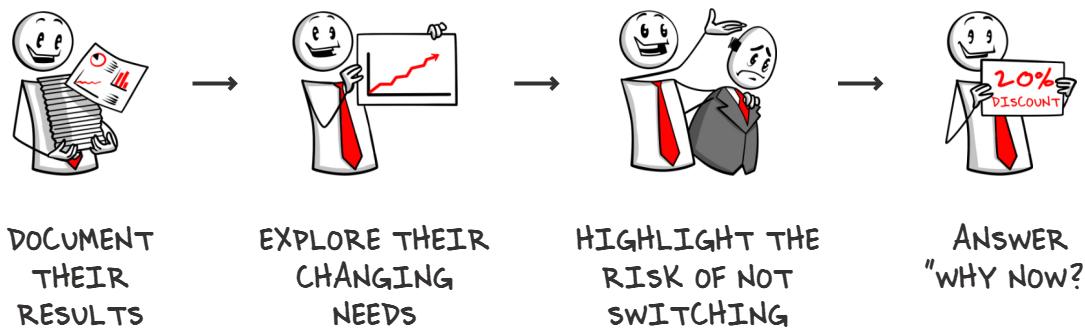
That's why you need to take a strategic approach. One that zeroes in on pain points, offers quantifiable benefits, touches on risks, and drives real urgency.

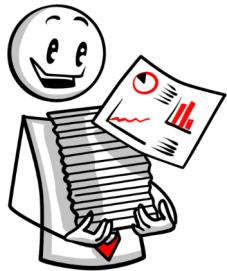
Enter **Upsell Framework**.

The Upselling Framework

This framework has seen real-world success in turning happy customers into enthusiastic large scale buyers. And when implemented properly, it takes the question mark out of upselling completely.

All you have to do is:





01. Document Their Results

The first step of the framework is to document how you've already helped your buyer. This is the sturdy, logical foundation on which your upselling pitch is built. This document is your way of booking regular meetings with your current buyers in a way that they get value out of too.

The Status Quo

When it comes to new vs. current accounts, it's all about how you treat the status quo. For instance, with new accounts, you want to

attack the status quo. Productivity could be better. Efficiency could be better. Bottom-line earnings *could* be better.

But with current accounts, you're actually attacking *and* defending the status quo at the same time. You're defending it because you don't want clients to second guess their previous purchasing decision and head to your competitor. But you're still attacking it so you can convince them to upgrade to your premium product or add another of your products to their business.

Think of it like this:

1. Closing a new account is picking up the status quo of a competitor and replacing it with yours.
2. Upselling a current account is like picking up the status quo that you already own and replacing it with a bigger, heavier one.

The status quo getting bigger and heavier is a positive thing as it locks the buyer even further into working with you over the long term.

Creating a Client Quarterly Report

The best way to disrupt the status quo and start the upselling process is by sending the buyer a report and booking a meeting to discuss it.

A quarterly report shares the business-based reasons why your buyers should upgrade. It proves why there's a business case for investing in your upsell. It's the bait that opens the door for a longer conversation.

The quarterly report isn't difficult to create. And sending it to clients before an upsell conversation is effective at driving change.

Your report should include 5 sections:

1. Your Earned Results

What results have you and your product earned for the buyer? How have you improved their business, streamlined their processes, and boosted their revenue? Get into the weeds here with hard, quantifiable numbers.

2. Review of Previous Buying Process

This should be a quick reminder that reconfirms the client did their due diligence during the original selection process. This is especially helpful if decision-makers in the account have changed roles. But secondly, it also reinforces the pain of going through all that again with a competitor. Remember, the goal is to get the buyer to invest more with us, without investigating what else is now available in the market.

4. Detailed Competitor Improvements

Your product may be very similar to your competitor's (that's just the way it is sometimes). But when you're working with existing buyers, that can actually work to your advantage. If you can explain to your client that there are similarities between the two ranges of products, they'll likely agree that there's little reason to investigate the market.

3. Sharing of New Industry Insights

This is where the real value starts to kick in. What industry issues are coming down the pipeline for the buyer? What should they anticipate next month, next quarter, and next year? And how can you help them weather that change?

5. Your Own Detailed Improvements

Explain how your company has improved their products since the buyer purchased from you. What new features have they been developing? And how can you help the buyer with the new challenges they must be facing?

To book the meeting, send over the report in an email and ask for a quick to call to run through it using the Closing Framework.

"Hi [NAME] - Here's your quarterly report which shares our performance and upcoming changes you should be aware of.

Worth 10 minutes to quickly run through?"

☆ **HINT:**

Your report should aim to offer value, not just prime the client for an upsell. As such, you need to frame it as a source of information they'll actually want.

The new industry insights section will do a lot of the heavy lifting here. But you should also focus on filling out the competitor improvements section with valuable information too. Insights that take a little research and effort to obtain. After all, the point is offering value, not just pointing to the results of a quick Google search.

If your report comes off as a blatant and shameless attempt to push your buyer towards purchasing a new version of a product they already have, it can backfire and spoil the rest of the framework.

“

When we provide value for someone, it's giving them the tools to make a better, faster, more effective, more efficient decision **than they would have without our input.**”

DS

David J.P Fisher, Sales & Networking Expert,
Salesman.com Podcast.



02. Explore Their Changing Needs

Your quarterly report has already laid a solid foundation for this step with the industry insights, detailed improvements, and cost of changing aspects.

Now it's time to directly explain the changing needs of the buyer.

Hopefully you have now earned a meeting with your buyer to run through the report

and continue with the rest of the upselling process.

With that meeting in hand, it's time once again leverage the Reality Gap Method to answer the questions:

- Where was your buyer when you first started working with them and what is their new **current reality**?

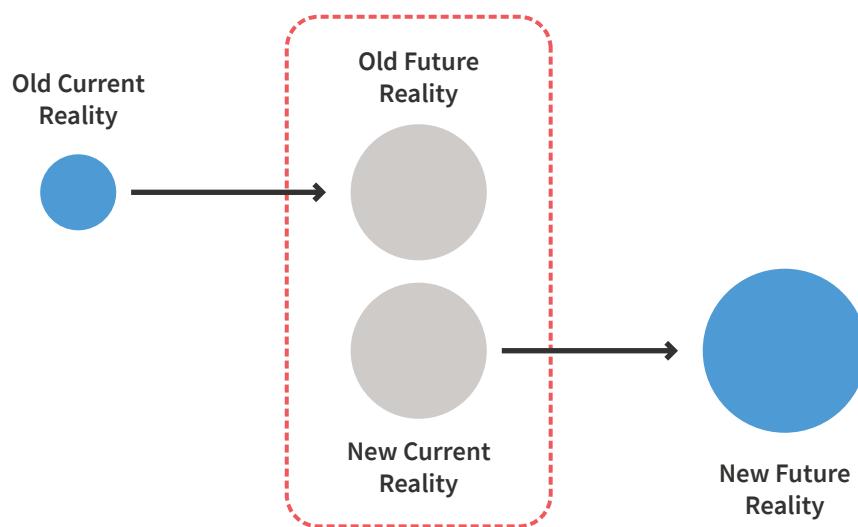
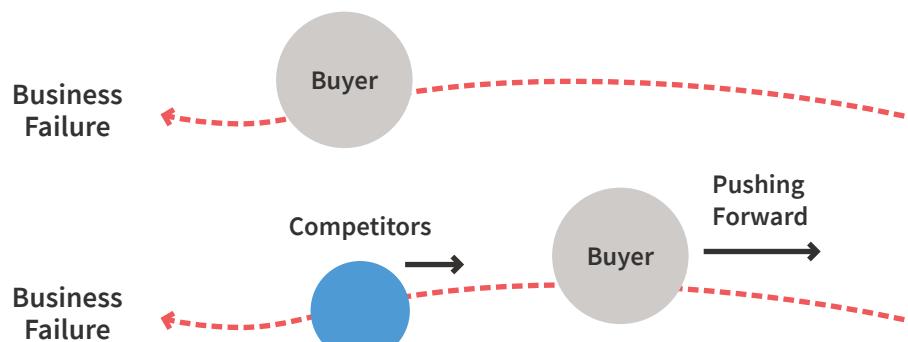
- How will your buyers business change in the upcoming years and how can you help them get to their new **future reality**?

These questions lead us to the tide of business and the one fundamental rule of business survival.

Think of the market as a tide pulling all businesses towards failure. Any organization that doesn't put the effort in to swim against the tide gets pulled towards the rocky shoreline of failure.

Businesses must constantly swim forward to survive and stay ahead of any competitors that otherwise will start pulling at their heels.

Tread water and die.



Therefore, if you buyers business has survived an additional 6-months since you last sold them anything, they must have improved, changed and grown. Otherwise they'd have moved backwards towards a slow impending doom.

That means that their original future reality that you sold against the first time around, is now their current reality. Which in turn means that they have a new, even bigger future reality for you to now sell against.

Offer a New Solution

When you've identified your buyer's changing needs, it's time to talk about how your upsell product can take the buyer from their new current reality to their new future reality.

How does your premium product help them achieve their goals? How does your premium product get them to where they want their business to be faster?

Try getting the buyer to vividly imagine what it would be like if they achieved their future goals using your product. Using "what if" questions here is a great sales tactic.

We got you from A to B last year. What if we could...?

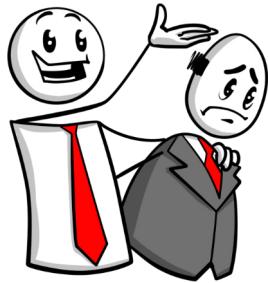
You didn't think it was possible to improve X. You did it. What if this year we...?

The goal is to get the buyer to verbally accept that their business, market and so product needs have changed since you originally sold to them. With that point agreed, it allows us to start the conversation of how we can better serve the buyers new, different needs with a product upsell.

HINT:

Research is going to play a major role at this stage of the framework. If you can pinpoint some of the biggest pain points and growth opportunities that your client is facing, you can leverage them to better sell your premium product.

Plus, it also shows you're truly invested in the relationship and understand their changing needs. And that builds trust.



03. Highlight the Risk of Not Switching

Once the buyer understands that their needs have changed and you can offer them more value than before, you need to pull on the other end of the spectrum of pain.

So far, we've been focused on how things are going to get better when they work with you. Now though, we need to shift to discuss the *pain* they will face if they don't.

We need to double down on the fact that there is a risk to the buyer if they don't keep up and enable us to support them. We need to help the buyer understand that the tide of the markets is ever present and if they don't continue swimming, eventually their job, department or organization will get shattered on the rocks of failure.

This turns the upsell from a "nice to have" to a "must have" in the mind of the buyer.

You can make this transformation by highlighting the six forms of business risk.

The 6 Forms of Business Risk

The risk of not changing comes in six different forms. If you can explain one or more of these forms of risk to your buyer, you'll immediately get them pushing towards an upsell contract.

1. Physical

This includes dangers to your buildings, equipment, and people. This can hurt the buyer's business by resulting in lost time, repair costs, legal action, and reputational harm. Has the buyer changed properties since your original deal? Can your product help reduce the new risk they face?

2. Strategic

This risk type involves roadblocks to achieving organizational goals. Has the buyer changed their business, marketing, operations, product, or sales strategy? Can your product help them manage this change or reduce the downside if their new strategy doesn't work?

3. Regulatory

Businesses are governed and guided by a wealth of legislation, regulation, and responsibilities, both mandatory and voluntary. The risks of compliance failure can be severe, including legal action, fines, penalties, and even closure. Have their compliance risks changed? How can your product reduce this new risk they face?

4. Operational

Operational risks are problems that can happen during the day-to-day running of your buyer's business. They can include things like human error, inappropriate staff behavior, or systems failure. Can your product reduce the new risks that now exist in the buyer's operations that didn't exist before?

5. Technological

With the benefit of new technology comes increased risk as well. Cyber-attacks, leaking customer information, or system downtime can be devastating for a business. If your buyer has increased their reliance on technology, can you reduce their new risks with your product?

6. Financial

From economic uncertainties and volatile financial markets, the move towards sustainable finance gets increasingly important as a business grows. If your buyer has increased in size, production, or headcount since you originally sold them, has their financial risk increased? Can your product help reduce this financial risk?

★ HINT:

Don't overdo it when hammering with all these risks. Usually highlighting just one or two will get the ball rolling towards securing an upsell. But be sure to pinpoint which risks are most urgent to the buyer, at this specific moment in time.

Highlighting too many risks can shatter the status quo that you've built and send the buyer into a panic of looking at all the other options that the market has to solve their issues. This puts your competition back in play and undoes all the hard work that you've put into supporting the account so far.



04. Answer “Why Now?”

By now, you've proven to the buyer that you've brought them real, tangible value with your product. You've demonstrated that their needs (and the industry at large) are changing around them. And you've given them a few reasons to sweat by outlining the risks of not upgrading.

For some buyers, these three steps alone will be enough to motivate action. But for others, fear of change may still be causing some hesitancy.

You can lean into the steps of the Beating Status Quo Framework here and that might be enough to drive the action you need to complete the upsell. If that isn't enough though it's time to break out the urgency-busting big guns—the Trigger Event.

A trigger event is a business risk or a seller bonus that is tied to a specific time and date.

Trigger events are often required to nudge a buyer over the hump of an upsell to help them take action.

We get deeper into trigger events in the Competitor Takeover Framework but let's take a quick look at some best practices.

Trigger Event Best Practices

Here are some best practices to follow when creating your deal closing trigger event.

Avoid Fake Urgency & Scarcity

These ploys, when uncovered, only breed animosity and eliminate buyer loyalty. Try to have a legitimate reason for communicating a trigger event. It could be a new feature launch, a shift in the market or a competitor coming online.

Don't Get Too Flashy

Too many buzzwords will rub buyers the wrong way. Instead, be clear, confident, and respectful. Position yourself as offering value, rather trying to meet a quota.

Personalize

If you're only cutting a deal or giving a unique discount with a specific buyer, let them know. And tie back the deal (e.g., lower price) to the client's goals (e.g. coming in on budget).

Keep the Pressure On

There's nothing wrong with sending a few helpful reminders that your trigger event is ending soon. Just be careful of getting too pushy.

HINT:

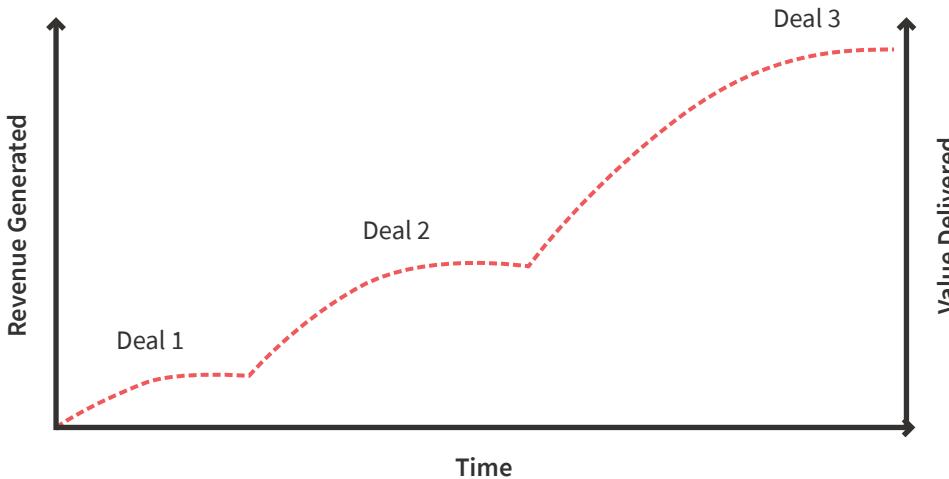
The benefit of a manufactured trigger event doesn't always have to be price-related. You could also offer complimentary on-boarding, expert consultations, additional products, or other creative incentives. But remember, they all have to be tied to a deadline to drive real urgency.

“

Understanding your audience is always the first step. **I think so much of sales is doing your homework, doing your preparation, and knowing what those trigger points are.** What are the things that are going to move these people to act.

”

**Robbie Crabtree, Senior Lecturer at MIT,
Salesman.com Podcast.**



Taking It Further: Land and expand

If your territory consists of less than 50 accounts and they are large, multinational organizations then you can take the Upselling Framework even further.

Rather than trying to close a large deal when the buyer doesn't know you, you can take what is called the “land and expand” approach.

It is often quicker to close a small sale and then upsell it to a large one when dealing

with huge companies than it is to close one big deal straight out of the gate. This is because small deals can go through without too much sign off. They can be done without getting on approved buyer lists. They can be completed without having to involve a procurement team too.

That means you can get in, add value and you gain access to the key stakeholders before you pitch the deal that you really wanted to close in the first place. At that

point, you'll fly through all the paperwork and bureaucracy because you're a proven asset to the organization.

To land and expand, close the initial sale as normal and then run through the Upselling Framework with your buyer. Ask them if other departments can be involved with the upsell and grow the account from within.



Wrapping Up

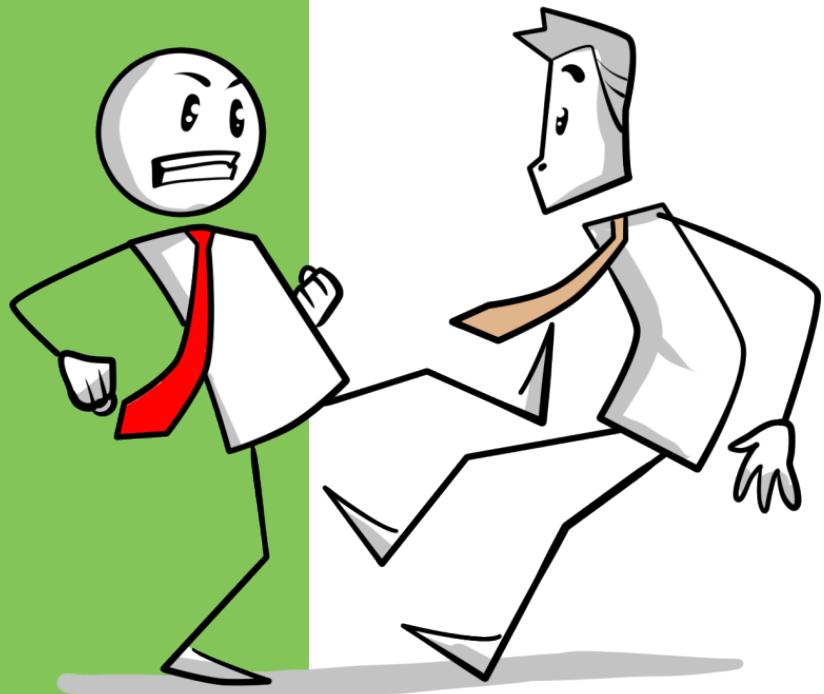
Upselling is one of the best ways to generate revenue and instill buyer loyalty.

Best of all, upselling to existing buyers is more efficient, effective, and profitable than fishing for new prospects.

So before you go spending 80% of your day on prospecting new business, try reaching out to your current buyers and upselling them on a premium version of your solution.

When you follow this framework, you'll be surprised how easy earning a "hell yes!" can be.

13. Competitor Takeovers

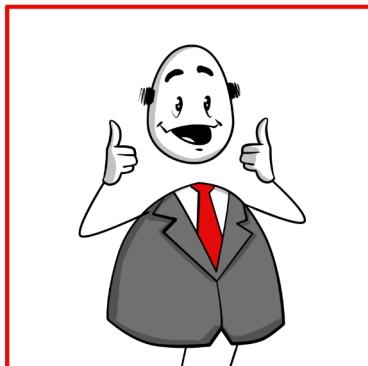


Competitor Takeovers

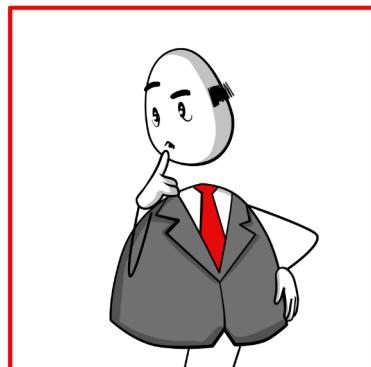
If you don't share how things could be better, people will stick with what they have.

Most likely, your competitor will have promised the buyer one thing and delivered slightly less. If you can highlight that fact to a prospect, you can build a gap you can sell into.

Harry was happy enough using a competing product to what Walter sells.



However, when Walter asked him if he got what he was originally promised from the competitor, Harry started to question things.



Walter shared how Harry could eliminate the gap between what the competitor promised and what was delivered for a similar price.

After that meeting, Harry was instantly ready to jump ship.

This chapter explains how to displace your competitors and take over their accounts by making your buyers second guess their original purchase decision.



No Account Is Off Limits

In the minds of many sellers, competitor accounts are off-limits for prospecting. After all, why waste time with a buyer that's already entrenched with someone offering a similar product?

But as it turns out, competitor accounts are some of the best buyers you can target. They're qualified, they're budget-ready, and they've already got a buying process in place for your product.

That being said, these buyers can be harder to win over, too. They might be more loyal to your competitor, resistant to change, and they take a bit more convincing on why your product is superior.

So, how do you sell to competitor buyers successfully?

You follow the Competitor Takeover Framework.

Why Takeovers Can Be Difficult to Pull Off

The perks are clear—your competitor's buyers are more qualified, more price-friendly, and more efficient to find and close than new buyers.

But there are also some downsides to going this route. At least in some cases.

Here's why:

Loyalty

If a buyer has stuck with a brand for years, you may have trouble overcoming their loyalty to it. Loyalty is a powerful purchasing motivator. InMoment found 77% of consumers say they've held relationships with specific brands for 10 years or more. And 61% go out of their way to buy from them. That can make it especially difficult to bring loyal customers over to your side.

Lack of Differentiation

Piggybacking on the last point, a buyer isn't going to make a shift unless there's an especially compelling reason to do so. How do you address needs better than the competitor? Are you faster? More feature-rich? Do you provide more value for less investment? If you can't demonstrate why you're better or even if you're better, you'll have little luck in closing a deal.

Change Hesitancy

Finally, individuals are change-averse. But businesses and organizations are even more resistant to rocking the boat. Change is scary. And there's risk involved in working with a new vendor. It's up to you to show how partnering with your business addresses those risks and provides more potential benefit than the potential detriment of signing on.

HINT:

You May Have No Choice

Depending on how mature your target market is, you may have to go after competitor takeovers if you want to smash your sales quota.

For example, almost all multinational organizations have partnerships with sales training companies. If I want to close big deals, I have to close these accounts and that means displacing the incumbent suppliers.

I don't see competitor takeovers as a hurdle or challenge. I love them. It's easy to position Salesman.com Academy against any "traditional" sales training program (most of them suck), the buyer already has the budget to throw at the project and there is the ability to show a strong ROI too.

I use the Competitor Takeover framework to get my foot in the door with these large organizations but I find after a meeting or two, they close relatively easily.

The Competitor Takeover Framework

How do you convince a loyal customer to come on board when they're already loyal to another company? The trick is to address unfulfilled needs, establish some buy-in,

overcome objections, and drive urgency. Run the buyer through the Competitor Takeover Framework.



“

By understanding who you're competing against, it gives you a chance to really understand **what are their strengths and how are we going to position yourself.**”



Interview with Norman Behar, Senior Sales Management Expert & Founder of Sales Readiness Group, Salesman.com Podcast.



01. Find the Gap

The first thing you must to to displace a competitor is to find “the gap”.

The only reason a potential buyer would switch away from their current vendor to you is because they have an unmet need. Maybe that need is a specific feature. Maybe it's more advanced technical support. The list of potential needs is limitless.

But in the end, those unmet needs typically translate into hassle for the buyer. And if you can reduce that hassle, you've just found the most powerful change motivator of all: the gap.

The gap occurs between the buyer's results at the end of the competition's sales cycle

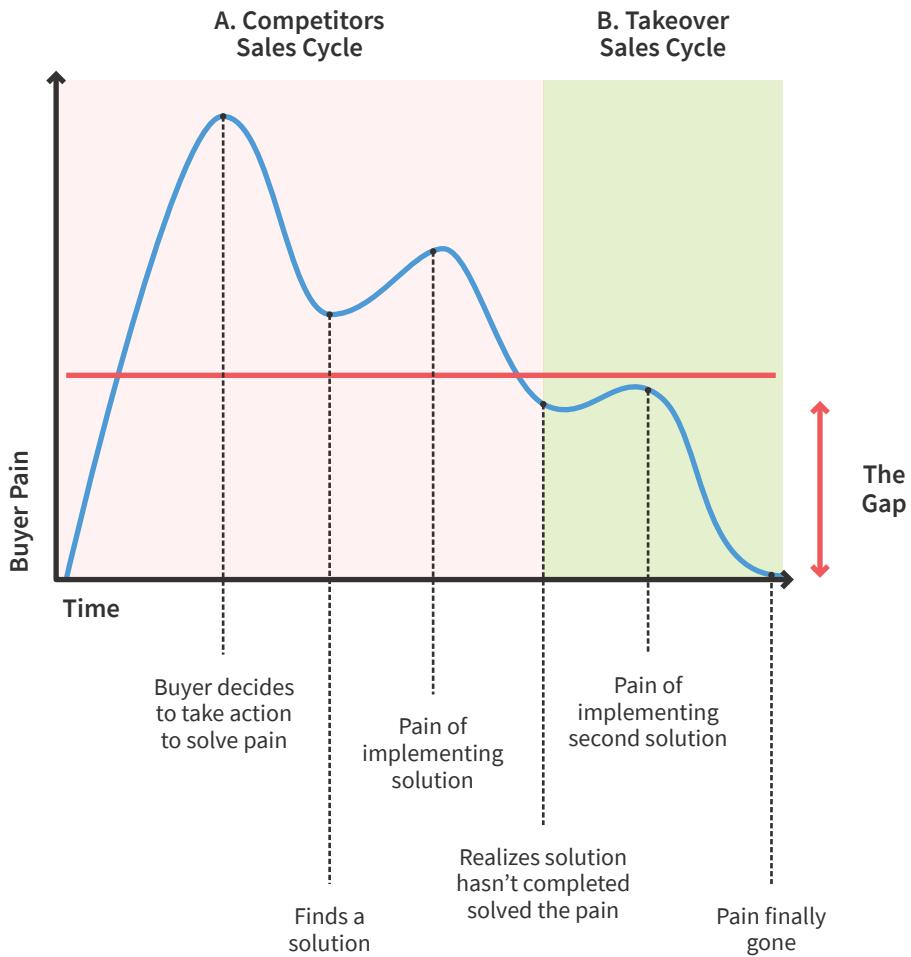
and the results that you could deliver them if they then moved the project to you.

Let's take a look at a diagram to visually see the gap in all its glory.

Understanding the Gap

The best way to communicate the gap is by describing the the pain reduction that the buyer would go through if they choose to move from a competitor to your product.

The goal is to identify how your product can alleviate the buyer's current pain points, after your competitor has tried to solve them and failed.



Often the B2B buying process is complex, the buyer often doesn't fully understand their own needs and so they end up running through the following cycle:

A. Competitor Sales Cycle

This cycle is demonstrated by the first section on the left of the diagram. And it's the cycle that gets your target buyer working with the competition:

- The buyer realizes they have an issue.
- Their stress rises until they find and implement a solution.
- Then they realize that they haven't fully solved their problem. Either because the buyer didn't understand the entirety of the problem when they

made the original purchase or they were sold the wrong solution by your competition.

- The buyer has a nagging pain because they know their issue still isn't completely solved.

B. Takeover Sales Cycle

This is the cycle demonstrated by the second section on the right. This is the cycle that gets your target buyer working with *you*:

- The buyer's pain increases as they realize that there might be a better solution and they might have to go through all the stress of changing again.

- As they see the value that you offer, they start to worry that their colleagues are going to think they're stupid or incompetent for making the wrong purchase the first time around.
- They implement your new solution and the pain drops.
- Of course nothing is perfect but the buyer is now happy as their daily pain from the issue is now much lower than it was before. This becomes the new status quo.

The gap between the first status quo point your competition left them at and the point where they are now is called "the gap."

A Few Notes on the Gap

As you're identifying and leveraging your buyer's gap, there are a few things you need to remember.

- The bigger the gap is, the easier it's going to be to convert the account. A bigger gap means you have more value to offer. And if that gap is small, the risks of changing vendors to your company might outweigh the benefits.
- The process of navigating the gap might be slower but it's usually less painful than implementing the original solution.
- Once you complete a competitive takeover, the account is usually pretty secure. For a third competitor to come in, they'd have to find another gap and at that point the buyer has usually got most of the value they wanted from your product.

Gap Building Questions

Now that you know what the gap is, let's talk about how to communicate it with your buyer. There are two questions you should ask during this step of the framework; the pain question and the down play question.

1. The Pain Question

I'm curious, the last time you tried to do X, how did it go?

With the first question, you are getting your buyer to both acknowledge that there are unaddressed pain points and coaxing them to let you know what those unmet pain points are. It might look something like this.

I'm curious, when you tried to increase the number of sales that your team is making (pain) with in-person sales training (competitor), how did it go?

It worked well at first, but then quickly everybody went back to their old ways, and revenue stagnated again.

HINT:

After identifying the buyer's unmet pain points in the first question, don't jump right in explaining why your solution is superior.

Doing so undermines the decisions the buyer made in the past. And that can lead to reactive discussions where the buyer is feeling defensive—they may put up their guards. Stopping you from getting the information that you need to help diagnose their issues.

2. The Downplay Question

After the first question to address the pain, we're going to further qualify that this is a gap that is big enough to sell into:

Is fixing this issue actually important to you?

For example you might ask:

Are your team hitting quota and doing fine overall or does this actually need to be fixed?

This question is important because:

- If the buyer follows our line of reasoning and tells us that the pain really is an issue for them, then we know we've found the gap.
- On the other hand, the buyer agrees with you that the pain isn't that big of a deal, they're probably not worried about it, and so it's going to be difficult to close a sale with them. At this point the buyer is unqualified for an immediate competitive takeover, unless you can find another angle to create a gap.

If the buyer is qualified and the gap is big enough to sell into, then the next step is to get the buyer to agree to our diagnosis and we do that in the next step of the framework.

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You want to understand if there is a gap between where they are and where they want to be. Is there something they're trying to do that they're not getting the outcome of? Because the truth is, **if there's no gap, there's no sale**. And our job as sellers is to understand that gap like a doctor would and be prepared to make a prescription.”

Gene McNaughton, President of Geobear USA & Sales Expert, Salesman.com Podcast.

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02. Get Agreement

Having highlighted the gap to the buyer, it's time for a simple—yet essential—step for getting buy-in. And it all hinges on a very peculiar human quality.

Once you get a single "yes" out of an individual, all the "yes" responses that follow are easier to earn. The pill gets a little less jagged and easier to swallow each time.

That's why you must get the buyer to verbally agree that the gap you've uncovered is truly worth the risk and the pain of change. If they say no, then they've just disqualified themselves as a potential buyer, taking a lot of extra work off your plate. If they say yes, then they're a good candidate and it's worth trying to convert the account.

So the question is, how do we get the buyer to verbally agree to make a change? We follow three simple steps.

1. “What” Question

This question is designed to “pattern interrupt” the buyer. They are fully expecting you to shove your sales pitch down their throat. We do the opposite by asking:

In regard to (the pain), what would you like to see happen with it?

It's a simple question. But it's open-ended to encourage the buyer to share if they've other plans or ongoing vendor negotiations that we need to be aware of.

2. “Reversal” Question

Again, the buyer is dreading what they think is ahead—the pitch.

I agree. It looks like there are a few issues here. What would you like me to do?

But what you're going to do is play off those expectations by asking the opposite what the buyer thinks that you're going to ask. You're going to ask them what *they* want: With a big enough gap, your buyer will undoubtedly turn around to you and ask for your advice on how you think the problem could be solved.

At which point you move onto step three.

★ HINT:

Our Brains Are Lazy

Human brains are kinda lazy. Your mind wants to make its interactions with the environment around it as easy as possible. It likes to live in an autopilot state where it gets by following patterns of interactions.

A “pattern interrupt” is anything that knocks the buyer's brain out of its autopilot state.

Pattern interrupts could be; not pitching when the buyer is expecting a pitch; sending a super short email after a couple of medium length ones; diagnosing their problems by asking questions rather than pitching at the first hint of an opportunity.

I've been teaching you subtle ways to pattern interrupt the buyer throughout the book. Use them to grab and keep the buyers attention so that you stay top of mind.

3. Get Agreement

Finally, you need to seal the deal by getting a verbal agreement that if the buyer wants to improve their situation, they need to work with you. This commitment helps lock the buyer into partnering up. And it also does wonders for preventing them from bailing out further down the line.

The agreement question might sound like:

If I can solve (the pain), will you move from (competitor) to us?

Simple as that!

Remember, this is an agreement based on commitment, not compliance. They're entering the agreement *willingly*, not being coerced into it. And that makes them much more likely to sign the paperwork and pay the invoice later on down the line.

HINT:

“Would It Be Worth It If...”

If you feel the buyer is still a little cagey at this point, you can ask “would it be worth it if...” questions to really cement the benefits of moving forward in the buyers mind.

These questions might look like:

If we replaced the competitor's camera equipment with our own and all it did was eliminate all the breakdowns and lost time you're currently facing, would it be worth it?

If we replaced the competitor's camera equipment with our own and all it did was eliminate all the breakdowns and lost time you're currently facing, would it be worth it?

Although the “would it be worth it” questions are mainly rhetorical, when the buyer responds to them, you'll increasing the amount of evidence on the side of the scale that favors getting the deal done.

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Urgency by itself doesn't guarantee you the business. But if people have a sense of urgency to do something, **then you're dealing with a more probable act that's going to happen**. Now, the question is, how do you create a sense of urgency for you, and how do you create a sense of urgency for your particular offering?"

Interview with Tom Freese, Founder of QBS Research & Six-Time Bestselling Author, Salesman.com Podcast.



03. Answer “Why Now?”

Having identified the gap and gotten the agreement that in theory the buyer should switch supplier to you, it's time to compel some action.

In a perfect world, all buyers would act immediately. After all, the sooner the implement your solution, the sooner they'd start seeing the benefits of reducing the gap.

But we don't live in a perfect world. And many buyers put off their purchasing decisions as long as they can.

Maybe it's next week, maybe next month, or maybe next quarter. But with each passing day, the odds of them pulling out of a deal grow higher and higher.

That's why it's vital you get your buyer to act now.

And that's where trigger events come in. We touched on trigger events in the Upselling Framework. Here we're going to go a step deeper into them.

Using Trigger Events to Drive Urgency

A trigger event is an event that gets your buyers thinking about doing things differently. It could be a competitor to your buyer launching a superior product. Or a CTO with institutional knowledge leaving the company. Or it could be a CRM breakdown that obliterates years of customer data.

No matter what the trigger event is, it's an opportunity to spur rapid change. And if you can identify them and tie the pain that comes from them, with the value of your product, trigger events are great leverage for inspiring your buyer to take action.

Trigger events can be easy to spot. You will know you're in the right place when a trigger event is happening because you'll hear your buyers say:

It's ironic you have reached out to me right now. I have a concern about one of your competitors.

I'm delighted you called. We're looking at making a change. Can we speak next week?

Bumping into a trigger event like this is awesome but ultimately lucky. Most of the time you'll have to do a little digging and uncover trigger events in your buyers world that you can take advantage of.

Here are a few to look out for:

A. Bad Experiences

A bad user experience will cause dissatisfaction. And when that happens, the buyer's emotions will be running high. That's the perfect time to convert an account.

B. Internal Changes

An internal change within the buyer's organization is another trigger event. It could be a change in talent, moving offices, shifting priorities, or anything else that makes the previous status quo now unmanageable.

This trigger event usually follows after a change in personnel or location. But it can also happen when there is a change in priorities in the organization from the top down too.

For instance, a computer company may decide overnight to stop producing hardware and only focus on software. This would be a great trigger event to exploit.

C. Catastrophe

A catastrophic trigger event could be either of the other two trigger events, but this one is held in its own category because it *immediately* displaces your competition. In fact, it can displace the buyer making purchases of any kind.

One of the best examples of a catastrophe trigger event is COVID-19 in 2020. Overnight, buyers stopped buying certain products and services altogether. What's more, these were products and services that were thought to be absolutely indispensable just a few weeks prior.

I worked for a multi billion dollar organization back in the day where the CEO got sacked as the media picked up that he was doing deals with the Japanese mafia!

What a trigger event that was for our competitors to act on.

These events might happen only once every decade within large organizations, and so if you're trying to convert an account and a catastrophic event hits, it can feel like winning the lottery.

But when you uncover a trigger event and leverage it to add urgency to your competitor takeover attempt, you are instantly more likely to succeed.



Wrapping Up

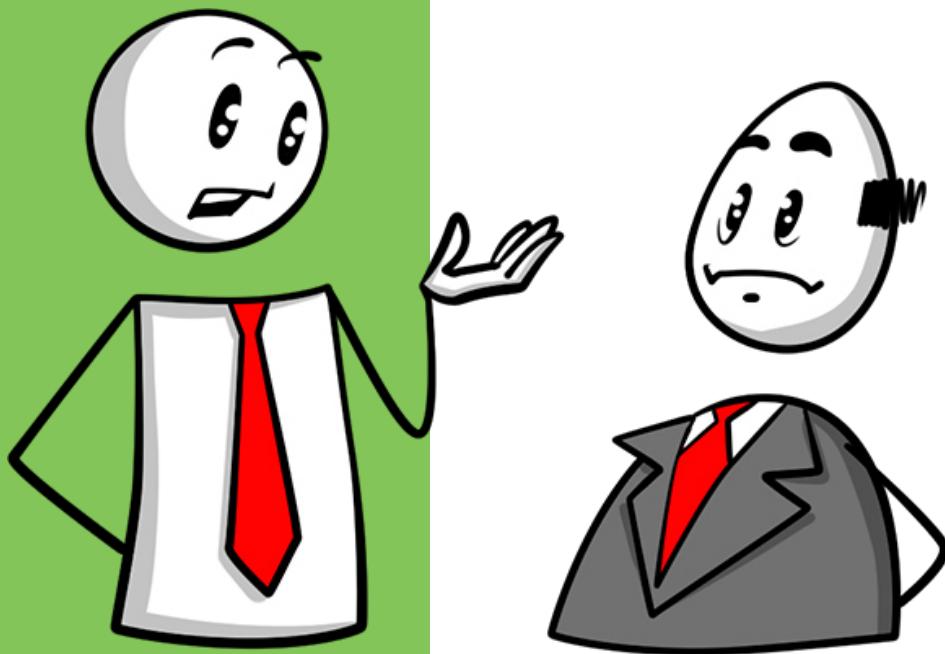
Some sellers don't bother with going after their competitor's accounts. They assume their buyers are too entrenched with their incumbent suppliers. And so trying to bring them over is a waste of time and effort.

But competitor accounts are actually some of the best leads you can get. They're qualified, budget-ready, and efficient implementors.

The only thing is you have to understand how to convince them your solution is the way to go.

The Competitive Takeover Framework is the absolute best method for persuading your competition's buyers that you're the superior solution to their problems.

14. Closing



Closing

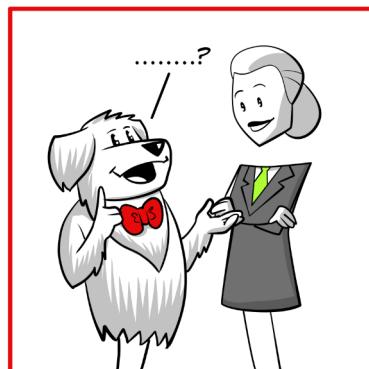
If you don't ask, you'll rarely get.

It's the same in sales. If you don't proactively close each step in the sales process, you never really know where you stand with the buyer.

Sam would always wait until the end of the sales process before he'd ask a closing question.



He was nervous about bringing it up too early as he felt awkward and clunky asking whether he would win the business.



Walter however asks closing questions throughout each selling interaction he has with his buyers.

Walter's buyers appreciate the closing questions because it helps them become clear on what the next steps to move the sale forward. Because of this Walter has a very qualified sales pipeline.

This chapter explains how to micro-close the buyer throughout the sales process with zero chance of rejection.



Micro-Closing Framework

Few things are as nerve-wracking for a seller as closing.

There's just something about coming right out and asking for the buyer's business that drives dread into the heart of even the most experienced seller. The anxiety, the rejection, the vulnerability of it all. But more than anything else, there's the tension of realizing, "If they say no now, it'll be weeks of work wasted."

But it turns out most sellers are going about closing their buyers all wrong. The majority of sellers close at the end of the sales process. The more effective process is to close your buyers throughout it.

Micro-closing multiple times on every interaction with the buyer removes anxiety, identifies snags early on, and makes closing the deal at the very end of the process more likely.

This chapter shows you the best way to continuously close deals rather than back-loading it all at the end of the buyer's journey.

The Importance of Closing

The general rule of thumb is that if you don't ask for things in sales, you tend not to get them. Leaving everything in the hands of your buyers may *feel* like a good idea. After all, a low-pressure approach can often lead to better rapport with buyers—a downright essential for effective selling.

And yet, even buyers with the best intentions tend to push major decisions off until the very last minute. Priorities can shift at a moment's notice. And that can leave you high and dry after weeks (or even months) of hard work.

That's why closing throughout the sales process is so vital. It reduces the buying cycle length, saves you time, and increases your chances of a "yes".

So if you want to make that deal, you have got to ask for the sale.

Let's Look at the Numbers

Here are just a few statistics that show the value of closing, the difficulty of earning a "yes", and the importance of following a proven closing strategy when making deals.

- The most challenging part of the job is closing, according to **36% of salespeople** (HubSpot).
- Businesses at the top of their industry close **30% of qualified leads** compared to **20% for average companies** (PointClear).
- The majority of salespeople (92%) **give up** on a lead after four "no" responses. But **4 out of 5 prospects** say "no" four times before saying "yes" (Marketing Donut).

Micro-Closing vs Traditional Closing

Let's take a closer look at what micro-closing looks like compared to the traditional route of closing at the end of the sales process.

A. Traditional closing

1. Book the meeting.
2. Qualification call.
3. Scheduling a demo call.
4. Product demo.
5. In-depth discussions on features, logistics, etc.
6. Group buying call.
7. Closing conversation.

7A. Traditional close:

Do you want to get started?

“

We don't add enough value as salespeople. We think that adding value is closing the deal. **Adding value is helping that customer be more successful a year from now**, whether or not your team can deliver.”

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Interview with Tim Sanders, Former Chief Solutions Officer at Yahoo & Best-Selling Author, Salesman.com Podcast.

B. Micro-closing

1. Book the meeting

1A. Micro-close:

If I can solve X would it make sense to jump on a call?

2. Diagnosis call

2A. Micro-close:

Does it make sense we solve this issue?

3. Scheduling a demo call

3A. Micro-close:

If I can prove how this works on a demo, will you introduce me to X?

4. Product demo

4A. Micro-close:

Do you agree that this could fix your problem?

5. In-depth discussions on features, logistics, etc.

5A. Micro-close:

Is this something that can be implemented smoothly?

6. Group buying call

6A. Micro-close:

Does it make sense to get the paperwork started?

7. Closing conversation

7A. Micro-close:

Does it make sense to get the invoice sorted so that we can get started?

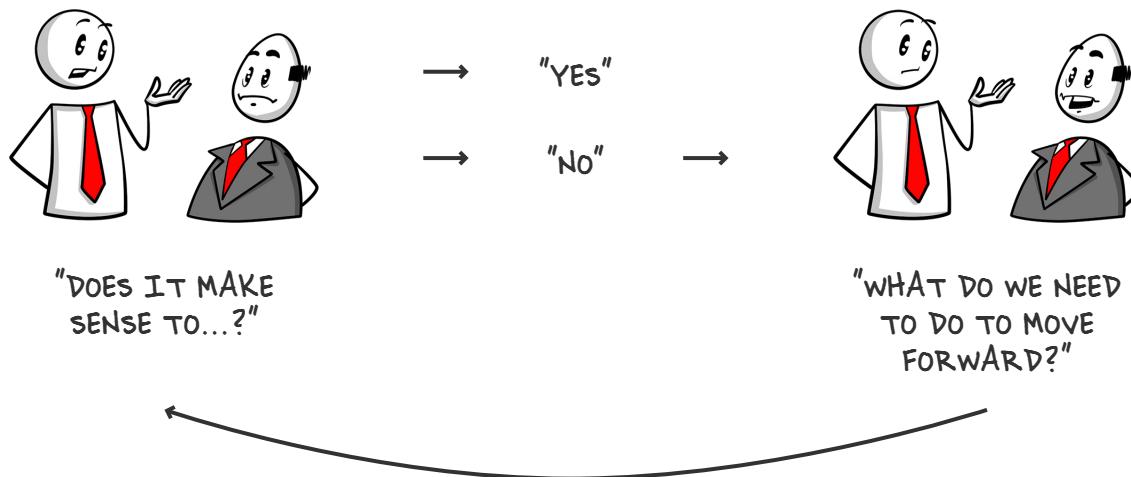
See how the seller checks in with the buyer multiple times throughout the buyer's journey? This ensures the buyer is on board, interested in your product and isn't giving you the run around.

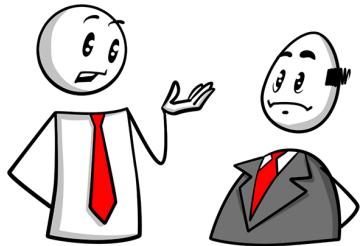
☆ **HINT:**

Micro-closing also lets you deal with any roadblocks before they become objections. It's much easier to deal with issues or misunderstandings as you run through the sales process rather than trying to battle a list of objections at the end of it.

The Micro-Closing Framework

Micro-closing is without a doubt the best way to approach closing. All it takes is following three easy steps.





01. Question A: “Does It Make Sense to [X]?”

Tweak the wording depending on what you’re selling and who you’re selling it to. But almost verbatim, you can ask the question “does it make sense to...” and get a positive response 90% of the time.

Here are a few examples of how you can use Question A to close the deal:

Looks like a good fit. Does it make sense to get started?

Does it make sense to move forward so you limit your downtime to a minimum?

Does it make sense for you to buy today so that we can get it installed for you next week?

Additionally, here are some examples of how you can micro-close throughout the sales process too:

Does it make sense to get on the phone and put together a rough business case so that you can pass this on to your manager?

Does it make sense for me to bring the camera system into your operating room so that you can have a demonstration of it?

Does it make sense to introduce me to the CFO so we can see if the numbers will work?

At its core, we're asking a *timing* question rather than a commitment question. We're asking if the *timing* is right at this moment to take a small step forward. As we're asking a timing question, the buyer cannot reject us personally.

If they say "no", all they're communicating is that it's not the right moment in time to move forward. This response is a prompt for you to enquire what needs to change to get to that next step. And that's where the next step of the framework comes in .

Why This Simple Question Works

The first of the micro-closing questions is deceptively simple. But it's also incredibly effective at moving the buying process forward.

There are three reasons why this question works so well. When you ask this question, you:

- **Relieve pressure** from the buyer, who is expecting you to be overly aggressive and use old-school closing tactics on them ("This deal goes off the table tonight at midnight" for example).
- **Update the buyer** as to where they are in the buying process and what the next move might be.
- **Force the buyer** to think logically about moving forward rather than emotionally on what could be at stake if everything went wrong.

HINT:

You may be tempted to over-complicate the question since it's so simple. DON'T.

This question works because it makes micro-closing a collaborative process. You're showing that you care about whether you and the buyer are on the same page. And you're asking for their permission to move forward, not pushing for momentum aggressively regardless of whether the buyer is ready or not to progress.

That goes a long way towards building trust and establishing rapport.

“

The fastest, quickest way to get away from that being perceived as a pushy salesperson who just wants to reach into my pocket, is you've asked me a question, or you've somehow demonstrated **that you care about me and you're interested in where I want to go and what's important to me.**”

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Interview with Deb Calvert, President of People First Productivity Solutions, Salesman.com Podcast.



02. Question B: “What Do We Need to Do to Move This Forward?”

So, what if the buyer says “no, it does *not* make sense to move forward”?

Don’t worry! This isn’t problem.

See, they haven’t said “no” to you. They haven’t said that they’re not going to buy. They haven’t said that they don’t want to take any action at all. In fact, they haven’t said any of this because you didn’t ask the buyer any of these things.

What you asked was simply, “*Does it make sense to X?*”

Therefore, if your buyer says, “no” to this question, they are sharing important

information about where they are within their buying cycle.

What the buyer is actually saying is, “At this moment in time, it does not make sense to do X.” In other words, the timing isn’t right... yet. And that is perfectly okay.

If you get a “no” to Question A, you’re then going to ask the follow-up question:

What do we need to do to move things forward?

In practice, it might look a little something like this:

*I hear you. Sounds solvable.
What would be a good step to move things forward?*

Your buyer will gift you the most logical and natural next step to move the sale forward. The best part is you don’t need to be a mind reader. The buyer will coach you. They will gift this information to you.

Question B: Formulas

There are two formulas you can follow to maximize the effectiveness of the second micro-closing question.

In the first formula, we demonstrate that we understand that the buyer is not ready, and we are looking for their opinion on what the next step should be.

Question B =
“Understanding statement” +
“What is a good next step?”

It might sound like:

“I hear you. Budget does sound like a problem. What would a good next step be to investigate this further?”

If you really want to go pro with your second closing question, you can add a layer of social proof and influence to it too.

Question B =
“Understanding statement” +
Social Proof + “Would a good next step be X?”

You can use this formula if you’d like to subtly nudge buyers in one direction if there are many available to them.

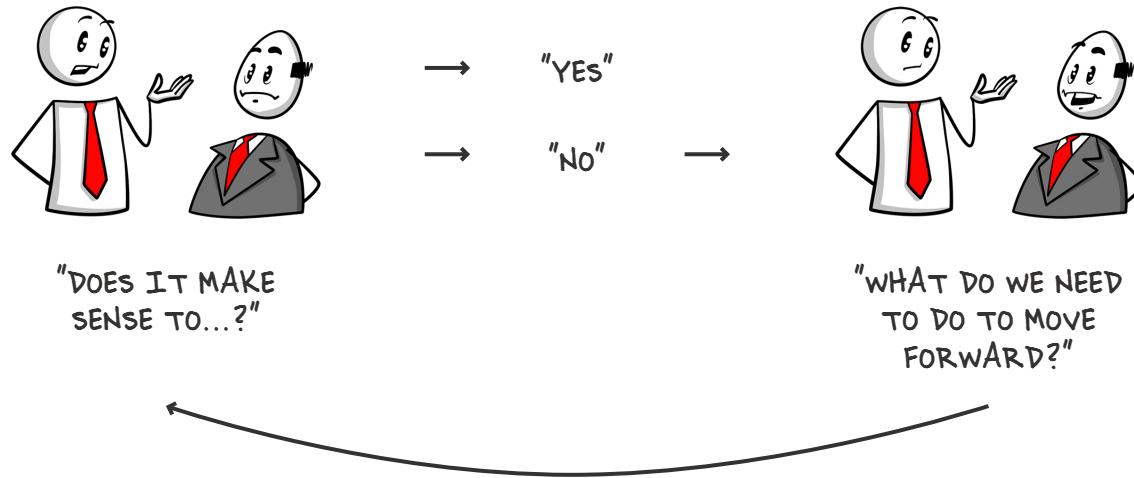
Here is an example of what it might look like in the real world:

HINT:

The value of social proof can’t be overstated. Humans are social animals. And when we realize that other people are taking a certain route, it triggers a very deep part of our brain and influences our thinking to follow what the tribe is doing.

The best types of social proof you can leverage are referrals from contacts the buyer knows, brands they’ve heard of, and even competitors.

But be careful though—overusing social proof or outright bragging is a surefire turnoff for many.



03. The Loop

The final part of the micro-closing process is to understand that this pair of questions can (and should) run continuously, in a loop, until the process has moved forward.

Framework Loop Example

Let's take a quick look at what this framework loop might look like.

Does it make sense to do X?

No.

I find customers at this stage often do Y. Does it make sense to do Y?

No.

We could also do Z if that makes sense. Does it make sense to do Z?

No.

That's okay, what would be a good next step to move things forward then?

We need to do A, is that OK?

As you can see, running through the Micro-Closing Framework is a continuous and fluid process. Sometimes, you'll land on an appropriate solution right off the bat. And in other cases, the loop will last longer.

As long as you trust the framework and implement it throughout the entire sales process, you'll never get ghosted or lose buyers to inactivity ever again.

★ HINT:

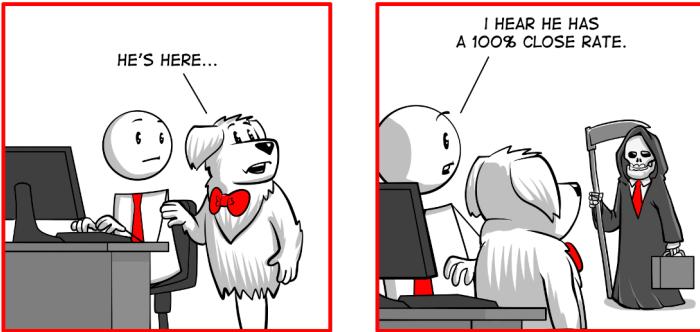
Don't feel disheartened if you receive repeated no's when running through the Micro-Closing Framework loop. For some buyers, it can take quite a while to land on an appropriate solution or next step.

This can be because they haven't bought a product like yours before and so they're not sure what the next step is themselves! But remember that with each negative response, you're refining your understanding of the buyer's needs. And that means you're getting closer and closer to a next step that everyone agrees on.

“

Don’t care about how you’re feeling. Your feelings aren’t real. Your feelings are the result of your thinking in the moment, and they change in the moment as quickly as they come and as quickly as they go. So, if you feel nervous or you feel upset, don’t take it seriously. It’s a trick that the mind has produced. **So, don’t let your feelings get in the way of making great deals.”**

Interview with Gavin Pressman, Media Sales, Leadership, & Organizational Development Trainer, Salesman.com Podcast



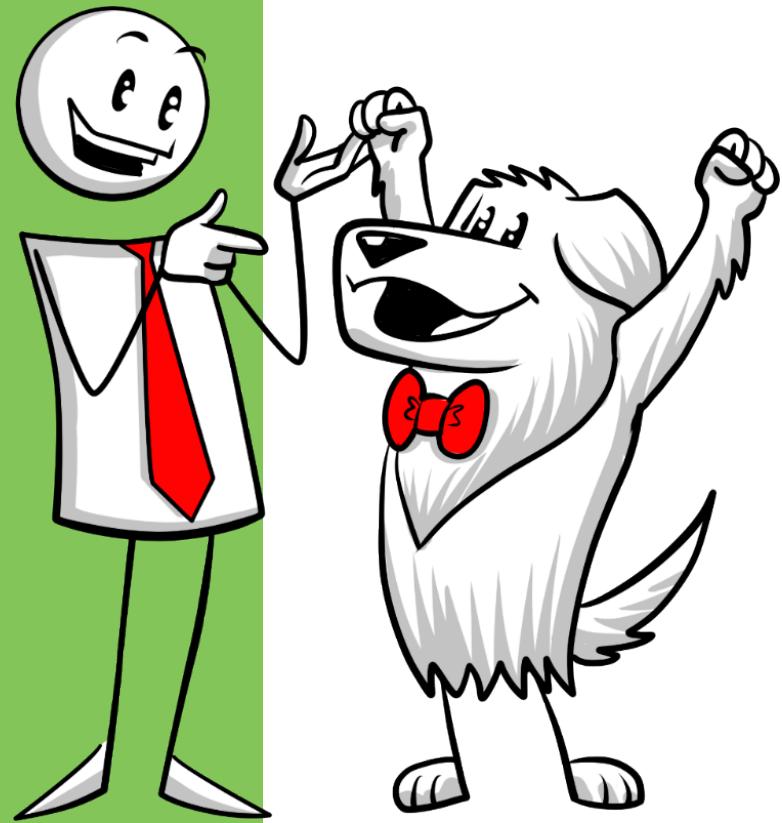
Wrapping Up

Heading into a final sales meeting gets a lot of sellers hearts pumping. Will they agree to the terms? Will you bring home that hard-earned, fat commission? Or will the buyer walk away, vaporizing weeks of hard work?

This is needless worry if you have been continuously closing throughout the buying cycle. Leveraging Micro-Closing will make your final meeting will feel like any other. No stress. No will they/won't they. And no shattered hopes and wasted time.

That's because with a process of continuously closing, you'll know your buyer's in it for the long haul. They'll have demonstrated continual interest along the way. And saying no now wouldn't make sense.

15. Referrals



Referrals

People will only recommend you if you've helped them.

It's the same in sales. When you solve a buyer's problem, they will be happy to recommend you to people who have similar issues.

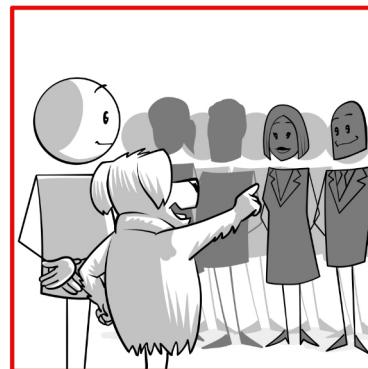
Sam starts every year with a clean slate of new buyers. He always gets close to his quota but it's a real slog.



Christopher told Walter that when he worked in sales, he always started the year getting referrals from his current customers.



This chapter explains how to generate endless referrals from your current buyers.



Walter does this every quarter and closes more sales than Sam because he can leverage the trust of his existing customers to speed up the sales process with new ones.

Referral Generation Framework

One of the biggest mistakes sellers make is that they abandon their buyer relationship straight after a purchase is made.

After all, what does a customer have to offer once you've already earned a commission from them, right?

Well, it turns out saying “sayonara” that quickly shuts off your pipeline from the absolute best type of sales lead—**the referral**.

Referrals are easier to close and are less costly to acquire than *any other* sales lead.

That being said, a lot of sellers don't know how to ask for referrals. And consequently, they can't take advantage of all the benefits that this lead type brings to the table.

The Referral Generation Framework shows you exactly how to ask for referrals. We'll also examine what's so great about referrals and the five qualities to look for in a referral source .

Why Ask for Referrals?

The answer is simple—referral leads are better than other leads.

Here's why.

A. Instant Influence

Simply put, referred leads are more likely to buy. They're *a lot* more likely to buy.

When sales leads come via a referral from one of your satisfied customers, you don't have to go through as much rigmarole to get the prospect to trust you.

Why? Because they already know you generate results.

After all, you did it with the referral source. Why can't you do the same for them?

B. Easier Closing

Sellers share that the buying cycle is getting longer with each passing year.

In fact, 55% of B2B sellers recently reported seeing an increase in the purchasing timeline, according to DemandGen. More than 1 in 5 said the timeline had increased *significantly*.

That means *more* time required to bring in the *same* commissions.

But the overwhelming majority of sellers find that referred leads close faster than any other lead type. And for you, that means shorter sales cycle lengths vs cold outreach and so more deals done each quarter.

C. Bigger Purchases

As if lower higher close rates, and faster buying cycles weren't enough, referral customers actually *buy more* too.

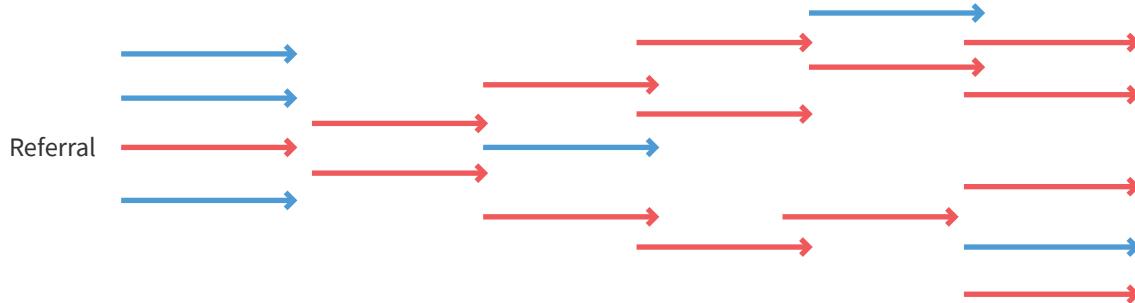
When referrals buy from you, they already trust you more than if you'd brought them in using other channels. You've got your referral source to thank for that. And because of that trust foundation, they understand the more they invest, the more value you can generate.

According to the Warton School of Business, the lifetime value of referral customers is higher than your average customer—16% higher in fact.

“

We've heard for years that we do business with people we know, like, and trust. Honestly, I think that know and like are irrelevant. **What it comes down to is trust and the way that you build trust.** And here's what happens though. You build real relationships and you become friendly with those that add that kind of value that you have that kind of trust in because they're impacting your career, they're making your life better.”

Interview with Scott Ingram, Founder of Sales Success Media,
Salesman.com Podcast.



One referral very quickly snowballs into many

Referral Snowball

Last but certainly not least, referrals beget referrals. Which beget referrals. Which beget... you get the point.

With each referral you bring in, you're not just earning a *single* new customer. You're also expanding your network of potential future

referrals and boosting the odds that you'll bring in even more of these high-quality leads.

The more referrals you have, the more referrals you'll get in the future.

In that sense, creating a referral generating system is like rolling a ball of snow down a hill. Then watching it pick up snow as it rolls, gaining more size and momentum, until it becomes difficult to stop.

Identify Your Best Referral Sources

Now that you understand the perks of generating referrals, let's lay the groundwork for how to get them.

The very first step to cashing in on a generation referral system is identifying your most effective referral sources.

The *best* referral sources aren't any old customers. Instead, they're the ones that demonstrate these four key qualities.

1. A Recent Buyer

Having a history with someone can be a powerful tool. Harkening back to the old days with former clients kindles a warm, fuzzy fire of nostalgia. But unfortunately, that often doesn't mean crap when it comes to great referral sources.

Instead, you'll want to focus on *recent* buyers. Who have you closed with in the past quarter? The past year?

These are going to be the best referral sources specifically because the buyers experiences with you are fresh in their minds. And that means they can speak more accurately (and more passionately) about why working with you is such a great idea.

2. Great Rapport

Piggybacking on that last point, you'll also want to focus on your buyers with which you have great rapport.

Rapport is vital when it comes to referral generation.

Even with the most high-performing, value-boosting, revenue-skyrocketing product, a low-rapport buyer isn't going to put in the (minimal) time it takes to connect you with a colleague or peer. Why? *Because they don't like you.* Why would they care?

So don't waste your time asking for referrals from buyers who you don't get on with.

3. Agree On Your Value

This one is key. And we'll go through the necessary steps to *confirm* this agreement of value later.

You're going to want to look for buyers who already agree on the value your product offers.

Maybe they've sent you enthusiastic messages after purchasing. Or it could be a five-star review. Any indicator of love for your product or service is a great jumping-off point here.

Now, this referral source quality is a bit flexible. Just because a buyer hasn't *confirmed* that they love your product yet it doesn't mean they won't give you a referral.

They may see the value but just haven't given you any signs.

But the point here is to pick out those enthusiastic buyers first. Only *then* should you move down the list to your less fervent past customers.

4. Well Connected

The bigger the social and professional network of the person making the referral, the more valuable the referral source is. And arguably, this quality may be the most important part of the process.

As you learnt in the first chapter, sales is a numbers game. The more connections you have, the more opportunities you get to close deals.

That's why you want to focus on referral sources with a sprawling network. The social butterflies of your industry. And when you've exhausted those options, *then* you should move on to the more modest networkers.

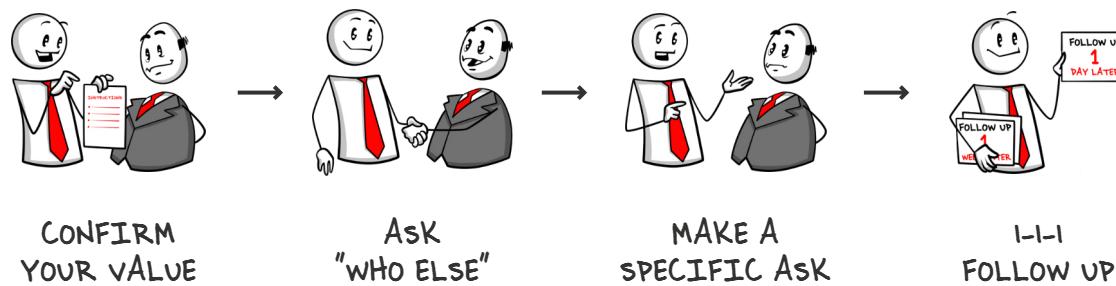
The Referral Generation Framework

We know why referrals are so valuable. And we know specifically what to look for in a referral source.

Now it's time to dive into the meat of it all—*how to ask for referrals*.

You can generate more referrals using the Referral Generation Framework.

Let's take a closer look.





01. Confirm Your Value

Let's face it—most people are wrapped up in their own little world. And even if you've delivered everything they've asked for on a silver platter, they'll *still* forget what you've done for them quickly.

That's why it's vital you get your referral source to confirm the value you provided *before* asking for the referral.

The best way to get the agreement on the delivered value by pointing the buyer to the results you've helped them achieve. And you can do that quickly with a little documentation.

Documenting the Value

To confirm your value with your client, follow these 3-steps:

1. Document

- A. Problems the buyer had when they started working with you.
- B. Results you promised to deliver.
- C. Whether you delivered those results.
- D. Things you've done above what was promised.
- E. How you're going to continue to improve their results next quarter.

2. Set up a call with your buyer and run through the documentation

- A. Be sure to email the documentation ahead of time.
- B. Go through each step on the call.

3. Confirm the value

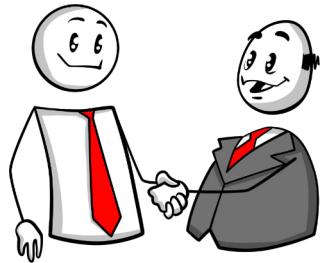
- A. At the end of the call ask, "So is it fair to say that we've delivered/over-delivered on what was promised?"

If you follow this process you'll walk away with a verbal confirmation that you've delivered value to your referral source. And now we can leverage that to start bringing in the referrals.

HINT:

Think of this step in the referral process in terms of upselling. Just as with upselling, you need to show the buyer that you bring value to the table. Only then will they be willing to trust that you can offer even more value to their peers or colleagues.

The best way to prove that the value has been delivered is by sharing quantifiable benefits (your documentation) that you've earned for the referral source in the past. The more number-oriented those benefits, the better.



02. Ask “Who Else?”

If there's one thing that unites practically all of humanity, it's that given a choice, most people would choose to be lazy.

We tend to choose the path of least resistance every time. That's why we're going to make it exceptionally easy for your referral source to reach out to other prospects on your behalf.

This step can follow directly from your “confirming value” call.

We're going to run through the following script to help the referral; course build a list of prospects that we can then connect with.

The “Who Else?” Script

When you jump on a “Who Else” call with your referral source, all you need to do is follow this script:

Is it fair to say that we've solved X problems, with Y solution, and you're happy with it?

Yes, that is correct.

If they say no, refer them to your previous documentation that they have agreed to and then ask again.

Do you know anyone else who has X problem? I'd love to see if I can help them solve it too.

Then you **shut up**.

No kidding—don’t say anything. Let the buyer think about the question and don’t help them out. Don’t point them in the right direction. Don’t say a word.

It might be awkward for a minute or two. And that’s okay.

Remember—you’ve made a promise and delivered value to the buyer at this point. They’ve agreed that you’ve helped them. And now it’s time that they do you a favor in return.

After the buyer gives you someone’s name and their contact info, don’t stop there. Instead, say:

OK great. Is there anyone else that you think I can help?

Then shut up. Don’t be satisfied with just one name. Keep going until the buyer really has tapped out of potential referrals they can introduce you to.

After that, you can move onto the next step.

HINT:

Stay consistent when reaching out to referral sources. I’ve found that having these conversations every quarter is a fantastic way to generate regular, reliable referrals that keep my pipeline topped up.

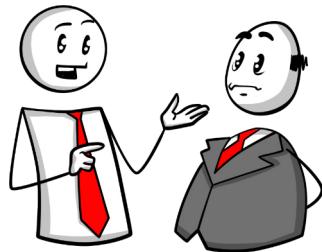
Plus, the more you build this framework into your scheduled processes, the more likely you’ll be to actually stick with it. So put in the work and stay consistent!

“

Success isn't about working harder. It's not about that. It's about doing the consistent action on a daily basis.”

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Interview with Marx Acosta-Rubio, Founder of Onestop & Business/Lifestyle Strategist, Salesman.com Podcast.



03. Make a Specific Ask

Now it's time to close (the referral process). The clearer you are with what you would like your referral source to do, the more likely they are to get it done.

That's why we're going to make a "specific ask."

Here's the difference between a regular ask and the specific one we should be aiming for:

Bad Ask:

Can you refer me to Barry please?

Specific Ask:

Can you introduce me to Barry Jones from ACME industries, via email? I can send you a templated email to use for the introduction if that would make things easier?

The best way to make this step more successful is by doing a lot of the work of the next step of the referral process upfront. And that means passing on a template the referral source can use.

See the difference here?

Simplify the Ask With a Template

With an introduction email template, you minimize the effort your referral source needs to put in to connect you to the prospect. That makes it more likely they'll actually make the connection.

You can use this template to get started:

Hi [NAME],

I've been working with [YOUR NAME] and [HE/SHE] has helped us with [COMMON PROBLEM].

I know they have really useful content and insights that they can send over.

Does it make sense for me to introduce [YOUR NAME] so they can see if they can help you out too?

Thanks,
[BUYER]

This template also proactively deals with one of the most common objections a prospect will make—"Just get them to send me some information." Instead, we're immediately rebutting it with the push for permission to be introduced upfront.

No conversation deflections. No easily ignorable emails. Instead, we're headed straight to the source.

☆ HINT:

This step might feel uncomfortable at first. But remember—you've already proven your value to your referral source. In fact, you both confirmed that value during step one.

And as long as you've provided sufficient value to your buyer, think of this step like getting the referral you've earned, rather than feeling like you're asking for a favor.



04. 1-1-1 Follow Up

Don't get lazy after you've gotten buy-in from the referral source—you're not finished yet. Now you have to make sure that the referral email gets sent.

People rarely take action the first time you ask them to do something that isn't mission critical. That's why it's up to you to create a system that ensures your buyer is making good on their promise.

I've found the 1-1-1 Follow Up method is the best way to stay on top of your referral sources. Use this schedule to follow up after your initial ask.

✓ **1 Day** – Follow up with the buyer and ask if they've sent the email.

✓ **1 Week** – Follow up with the buyer and ask if they've sent the email. Add the potential referral on LinkedIn. Your introduction message should mention the referral source.

✓ **1 Month** – Follow up with the buyer again. Now start prospecting the potential buyer, regardless of whether the introduction has been made.

Tracking Your Referrals

Keeping on top of referrals is tough if you don't have a system. The 1-1-1 method is a great start. But you'll also need to stay organized if you want the best results.

That's why I recommend documenting your referral process in a spreadsheet. This will help you keep track of who you need to follow up with and when to do so.

You've already put in a bunch of hard work at this point of the framework. Don't let it all go to waste by dragging your feet on the follow ups that might be needed to make the introductions happen.

HINT:

When you do hear from the referral, get them on the phone. No sending them content. No social selling. No procrastinating and putting things off even longer.

With a referral, you already have a rapport and social clout leg-up that should let you take things an immediate diagnosis call. And the longer you wait to make real, meaningful contact, the less beneficial that leg-up becomes.

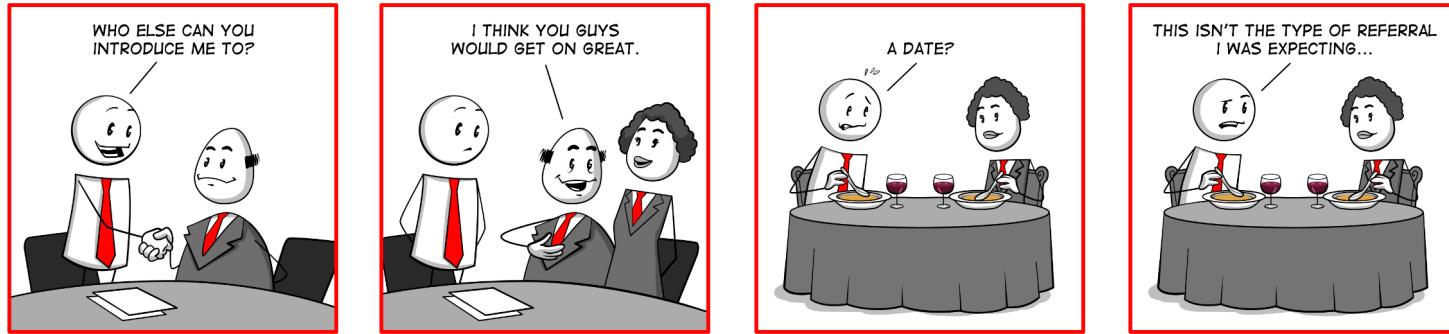
The goal with all referrals is an immediate diagnosis call. Nothing else is acceptable.

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A video or phone call
**is worth a thousand
emails.”**

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**Interview with Erica Dhawan, Award-Winning
Keynote Speaker & WSJ Bestselling Author,
Salesman.com Podcast.**



Wrapping Up

Without a doubt, referrals are the best sales leads. They're already primed for rapport-building and they're easier to close.

What's not to love?

When you follow this simple framework, you'll reliably pack your pipeline full with valuable referral leads from your past buyers.

For you, that means easier deals, more *lucrative* deals, and a much higher earning potential.



Wrapping Up

Don't Be a Sales Nerd

The sales industry is plagued with what I call "Sales Nerds". A Sales Nerd is an individual who has read all the books, listened to all the podcasts, watched all the videos... but they don't implement the training and so never smash quota.

Selling Made Simple has armed you with everything you need to beat quota this year. The only thing stopping you from achieving that goal is **you**.

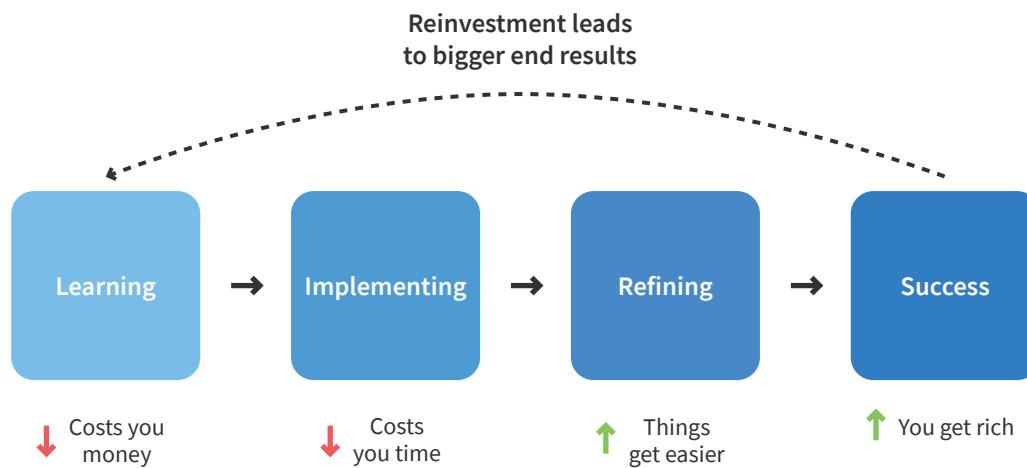
Selling Made simple covers the timeless fundamentals of the sales process. The 15 frameworks covered in this book never change. They will be essential for quota attainment forever.

But, depending on the aspirations and financial goals that you have for your sales career, there can be value in further investment into your sales performance.

B2B sales is one of the only professionals where spending \$X today an lead to an immediate return of \$Y tomorrow.

There aren't many other investments like it.

If you want to invest further into yourself and reach your revenue generation potential I've a couple of options for you.



1. SalesCode Assessment

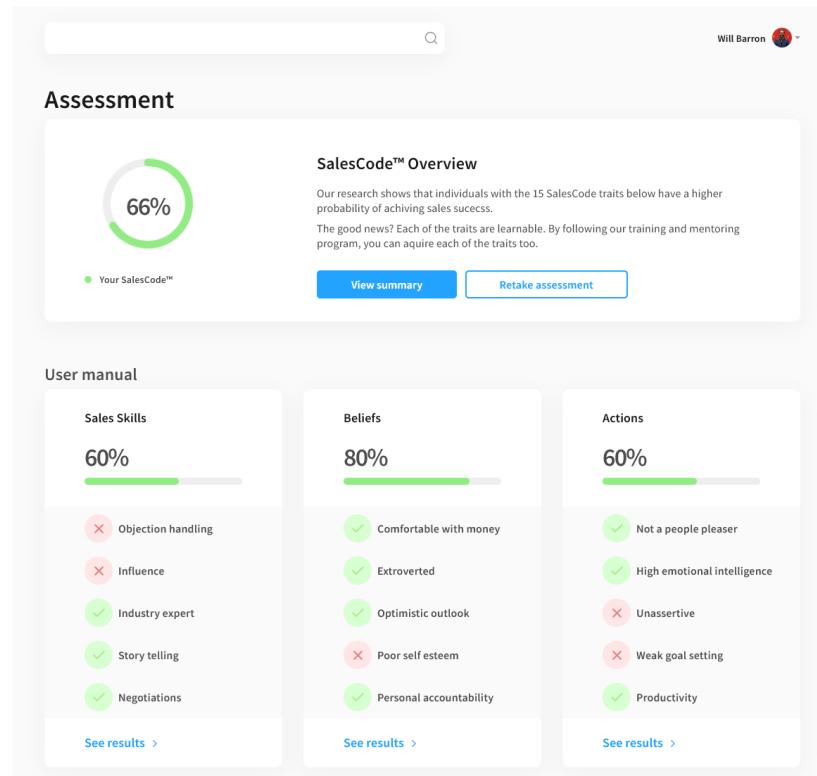
Before you can hit your goals, you need to become the person who is capable of hitting them.

Read that line again. And again if it didn't sync in.

There are 15 traits of high performing sellers. This has been verified by the 14,000 salespeople and small business owners who have completed our free SalesCode Assessment.

The free assessment will tell you the traits of high performance that you have and any that you need to develop so that winning more business comes naturally to you.

For example, if you're not **assertive**, you will not ask for the business. It doesn't matter how much you know about your buyers, your industry or their needs, you'll never close as many deals as you're capable of.



Or if you have poor levels of **self esteem**, when you face rejection, you won't be able to shake it off and it will have a knock on effect on the rest of your sales interactions that day.

So, head to Salesman.com/Assessment today, run through the SalesCode Assessment and see what areas of your personality might be holding you back from reaching your selling potential.

2. Salesman.com Academy

If you understand the frameworks in this book but want guidance and mentoring in implementing and leveraging them to make the most money possible in your sales role, then join Salesman.com Academy.

Salesman.com Academy will help you find and close more deals in the next 30 days or your money back. It covers all of the frameworks in this book and also the additional 15 frameworks that cover your SalesCode Assessment results too.

When you get signed up you'll:

- Have a one-on-one consulting call with our team to find the 10% of immediate changes that will give you a 90% improvement in results.
- Get access to our 30-day, step-by-step, framework based training program so

The dashboard features a sidebar with links: Dashboard, Assessment, Training, Coaching, and Community. The main area has a pink header with the text 'Will, you're crushing it!' and a message: 'You've completed 22 workshops and memorised 82 practice scenarios. Congratulations!' Below this are sections for 'Overall progress' (67%, Beginner), 'Progress' (SalesCode results: 73%, Training completed: 22, SalesCoach memorised: 82), and 'Community' (status updates: 'I'm hitting quota. The rest of the team isn't.', 'Celebrating: 145% OTE!', 'The book has launched. Link inside.', 'First email in cadence – feedback').

you can get the frameworks implemented in weeks rather than months.

- Receive access to unlimited group coaching calls so that we can support you all the way to Presidents Club.

Book a call with our team at Salesman.com and see if you're a good fit for Salesman.com Academy today.

Acknowledgments

This book wouldn't have been impossible without the help and hard work of the Salesman.com team. I have to personally thank Jorge, Alex and Oscar for putting up with my demands and banding together to create something so special.

I'd also like to thank the 1,000+ guests and co-hosts that I've had the pleasure to engage with on the Salesman.com Podcast over the past 8 years. Without your openness to share insights and the strategies that are working in the market, there would be no book.

Finally I'd like to thank the Salesman.com Academy members and wider Salesman.com audience. Without your support none of this would be possible. I appreciate you and hopefully we've helped you make a couple of quid over the past decade.

Keep pushing forward.

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