



The Sales and Sales Management Process (Part 2)

White Paper / Issue 6

We have worked with service providers in a wide variety of fields, including banking and financial advisors, law, software, engineering, and architecture. In all, we've worked with almost 100 such organizations in our 20+ years in business.

With rare exceptions, the majority of these firms, though well-run in the main, tend to give the sales function (business development) short shrift.

But isn't revenue generation critical to the success of any business? And isn't it obvious that relationship development is critical to generating new business, and even more importantly, to maintaining and furthering development of key client relationships?

Let's dissect the sales and sales management process to determine what it takes to be successful in this critical business function.

First, selling is viewed with disdain and fear by most professionals. We have heard many times the comment that "I didn't get into (accounting, law, engineering, etc) to be a sales person. I'm a professional." This may be true. However, selling does not need to be the arm twisting, slick-pitch world that many professionals think it is. As a matter of fact, selling focuses heavily on softer skills, such as asking good questions, careful listening, etc—skills most professionals are adept at.

It is necessary to conduct an ongoing series of meetings aimed at demystifying the entire sales process. This type of ongoing coaching and training is necessary for those charged with business development responsibility. Beyond this type of ongoing coaching and training, the role of sales management is to emphasize the elements of commitment and accountability.

Most professionals would rather work on their craft than make a dreaded sales call. Beyond coaching staff on how



to make sales calls, sales management must assure that they are, in fact, making the calls at all.

The key here is to request a monthly document from all staff with business development responsibility. This document outlines who they will be contacting in the upcoming month, and what they intend to accomplish on those calls. After the calls are made, these documents must be reviewed, and next steps discussed.

The staff member needs to understand that he/she is making a commitment to specific actions over the next month, and that you will hold them accountable for accomplishing those actions. This is generally well understood and practiced religiously within the industrial world. In the world of professional, technical, and financial services, this is seldom the case.

...continued on back

Have you had your key people tested to determine their profile, and what style or approach would work best for them?

Have you had them attend seminars, read books or articles on the more sophisticated methods of selling?

Have you allowed billable hours to overtake the necessary business development time commitment necessary to ensure your company will thrive in the future?

What resources have you expended to make your firm's business development efforts a success?

In our next white paper, we will delve into the actual sales call and process, including a series of questions to ask potential clients and a methodology for effective relationship development.

Regardless of the level of technical expertise your professional staff may possess, where do they stand on the spectrum of interactive skills?

On professional selling, which has become known as “the consultative sell?”

To what extent are they skilled at developing relationships, creating trust, and the like?

To what extent are they in the “inner circle” of their key clients?

More to come in our next issue. What is sales management? What does contemporary thinking say about what works in a relationship development effort? How much training has your team had in this process, and what training makes sense? How adept is your team and how do you know?

Truelson Associates has served over 200 clients in its 20+ years of existence. Of those clients, fully 80% of them have been professional and other service providers operating in a business to business mode. Law, public accounting, engineering, architecture, banking, and other financial service providers are heavily represented in that mix.

We offer services in these key areas:

- Strategic planning
- Business development planning
- Management of sales and marketing implementation efforts
- Management/leadership coaching

Unlike most consulting firms, we take a hands on approach to our efforts, functioning as part of our clients senior management team to achieve stated objectives.

We are proud of the results we have achieved for and with our many clients, and are happy to provide impeccable references to substantiate those results.



Walt Truelson
wt@truelsonassociates.com