

An illustration featuring a brown dog on the left, wearing a black collar with silver studs and a gold tag, barking with its mouth wide open. On the right, the head of a dead horse is shown, lying on the ground with its mouth open, as if it has been bitten. The background is a textured, light-colored wall.

Barking Up a Dead Horse

**Avoiding the Wasted Time and Effort
in Business-to-Business Sales**

Workbook

Be Yourself, Sell More

If you are looking for any of these things, you might be in the right place:

- Desire to get and keep more clients
- Feel like your people are not skilled at generating new business
- Your selling/prospecting process stretches out much too long
- Your organization is not doing an adequate job communicating your unique value to prospects and clients
- Need to increase morale, and team performance
- New ways to differentiate, less getting beat up on price
- Too many lingering, “on the fence” deals
- Non-sales staff (project managers, account executives, tech experts) need to do a better job at identifying new business opportunities from existing clients
- You get caught “doing the work” and don’t make time for networking, prospecting
- Not growing at the rate you feel you deserve and desire

Testimonials

“Of all the past company training I have had, something was missing for me. I was introduced to the principles in this book and Tom’s coaching at just the right time. Now, I really feel connected to my work, and finally feel that I have the processes, resources and tools to succeed.”

— Dawn Muller, Sales Representative

“Since applying these principles, my income has tripled. Now, this is not a *quick fix*. My largest month before implementing this new approach was \$45,000 in sales. Within eight months, I had a \$180,000 month. My best year ever before was \$235,000 in revenue. We are six months into this year and I currently have \$900,000 in deals to close in my pipeline. I have learned to differentiate myself from my competition, and how not to get caught competing just on feature, function, and price.”

— Brandon Jeffress, National Account Manager

“I have read through many sales training books. Yours was the first that actually talked about getting “sales-speak” OUT of our language, learning how to really connect with prospects, and get to the truth. This approach has taught me to overcome my fears and ‘detach’ my emotions so I can be the most effective in helping prospective clients solve problems. I am beginning to reach my true potential, as a person, business owner, and sales professional.”

— Paul Lorinczi, Business Owner

“Over the last eight months of approaching sales in a new way, I have accomplished the following: Hit my annual quota in 6 months. Increased my average deal size from \$40,000 to \$250,000. Hit \$1,000,000 in sales in eight months. Nearly doubled my income.”

—Bill Crouch, National Sales Director

“In the end, that is the real work of an explorer: to share all that you have learned, to make it available to others, and to close that cycle that you started when you began your journey.”

— Dr. Robert D. Ballard,
oceanographer and discoverer of the wreck of the Titanic

Are you "Barking Up a Dead Horse" in your efforts to grow your business?

Join author and consultant Tom Batchelder in an interactive workshop to help you find out why things are not working in your efforts to grow your business & what you can do to change your results.



"Many professionals that are responsible for bringing in new business are not comfortable with traditional approaches to sales. There is another way to do it. You can be yourself and sell more. This is all possible if you're open to looking at yourself and your business differently than ever before."

—from "Barking Up A Dead Horse"

San Francisco | November 8-9 Th: 1-5pm, Fr: 8am-12pm
 Indianapolis | November 16 8:30am-1pm
 San Diego | November 29th 12:30-5pm
 New York | December 6 12:30-5pm

Each workshop is limited to 20 participants to ensure customized, real-time learning and is by invitation or referral only. Registration fee is \$500 which includes a follow up coaching call and a copy of Tom's book.

Are you a:

- Successful professional responsible for developing new business but do not consider yourself a "salesperson?"
- Business owner working hard to grow your business, but it's just not happening fast enough?
- Specialist (i.e.: Financial Advisor, C.P.A., Lawyer, Consultant, etc.) that must sell yourself and your firm to make more money and advance your career?

Some of what you can expect to learn:

- How to get through your mental blocks around "selling" activities.
- New email language that will get a quick & truthful response from prospects.
- How to be yourself when selling your services without feeling forced or phony.
- Understand your unique value and talk about it in a compelling way.

» RSVP to Ray Green at ray.green@perficency.com
 Or, register online at www.perficency.com

"Tom's approach to business development has changed our business culture. This approach gave us a different way to think about sales, a new language that was much more human, and a systematic process that allows us to be in control with prospects and clients."
 — Roseanne Luth | President, Luth Research; Chairman, CASRO University



Tom Batchelder is a business consultant and sales coach focused on a professional audience that wants to grow their business but is put off by traditional approaches to sales. As Founding Partner of Perficency, Tom oversees a national sales coaching and consulting organization with offices in Indianapolis, San Diego, San Francisco and New York. His new book, "Barking Up a Dead Horse: Avoiding the Wasted Time and Effort in Business-to-Business Sales," will be available October 2007.
 » For more information, visit www.perficency.com or call Ray Green at 760-402-6285.

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WHAT TO EXPECT FROM READING THIS

Warning: There is no magic fairy dust within these pages. I do not believe you can follow any magical path to riches and success. What I am suggesting is difficult to consistently practice, and yet elegantly simple in theory. Before reading further, I need to give you a few disclaimers.

1. I do not have “The answer.” This is not a connect-the-dots “*how to become a better salesperson in 30 days*” manual. Some of these principles and approaches you may already know and understand, but are not consistently practicing. Other elements might be new to you. These days most people are increasingly looking outside of themselves for answers. There are plenty of authors, speakers, and “gurus” that would like to give you “the answer.” Related to the topics in this book I do not have an easy answer for you. I do have some ideas, concepts, and approaches that have worked for me and thousands of others. There is no one “right way” to sell, negotiate, communicate, and achieve. The real answers are already within you buried just beneath the surface.

2. I will not be attempting to name-drop or entertain. I will give you a few samples, examples, and templates from both my experiences and those of real people who are having success out in the business world with the material presented in this book. I am not, however, going to tell you the story of how Jack Welch used what I taught him to win an \$800 million project for GE on the day of his retirement (For the record – I don’t know Jack). These kinds of anecdotes and case studies

can be inspiring and interesting. The problem I have with this star-studded approach is that it can make it too easy for you to separate yourself from being able to do what these already powerful, rich, and seemingly super smart people can do. I will not try and sell you on how impressive my company is or how super important my clients are. I am going to share with you some examples of how others and I have applied this material. These people struggle with the same things you do.

3. This book alone is just the beginning. Access to and processing information is one thing. It can be helpful, but limited, in its ability to generate sustainable change and quantum leaps in results. I believe most well intended efforts at sales and business communication training are destined for mediocre results at best; a complete waste of time and money at worst. In order to create real, sustainable change in individual and organizational results, you must:

- Re-think and rebuild the foundation of all sales-related thinking, language, and processes.
- Integrate a new approach slowly and consistently over a period of time.
- Blend small group training with some form of one-to-one coaching and real-time, situational support.
- Have complete, hands-on participation from key leadership / company stakeholders.

This material, like anything else, is only effective if you are practicing and experientially building it into your day-to-day interactions. If you want to get more from this material, start a discussion group with your team or incorporate some of these practices into your weekly meetings. Consider hiring a coach or consultant to help you delve deeper into these topics and make them specifically relevant for your business.

4. You will experience repetition. There are a number of points, and key concepts that you will find repeated throughout the book. This is by design, for two reasons. The first reason is that the fundamental concepts run more like undercurrents through everything you will read. They are the glue that holds all the elements of the book together. Secondly, I find the only way to re-train your brain is through repetition. It's difficult to think new thoughts and shift your approach in a sustainable way. The only hope for this is repetition and consistent daily application.

5. You may not agree. You may find there are concepts, ideas, and philosophies presented in this book that you don't agree with or can't quite wrap your brain around. It is not my intention to have you believe everything that I believe. I am going to suggest to you some tangible tools and intangible ideas that have significantly impacted bottom line results for thousands of other people, including me. You must decide what's useful for you and what you're open to. Our human tendency to avoid conflict and not share differing opinions in a respectful dialogue significantly limits our ability to learn and grow. I'll be curious to hear what you connect with and get results from, as well as what you most dislike, or don't agree with in these pages. All feedback is welcome: tom@perficiency.com or www.perficiency.com/barking

INTENT AND OVERVIEW

The principles in this book are fairly straightforward. I believe that we all make the whole process of “sales” or “business development” much too difficult, and thus extremely inefficient. What is most astounding to me is how difficult it is for most individuals and organizations to recognize, accept, and correct these inefficiencies on their own.

Because the principles I am suggesting are so clear-cut, they can inspire resistance. I have found many in business and sales who think they “got it” and find these approaches to be simplistic and not relevant to their work. Some have judged my approach as a bunch of psychological mumbo jumbo. They say, “Just work harder and stop your whining.”

People are by nature risk averse and want to feel in control at all times. Everything I will outline in these pages is designed to help you maintain greater control over your process of new business development. It is also intended to reduce the amounts of lost time and energy and the risk of having not enough of the right kinds of business on the books or in your pipeline. The paradox here is that you first have to be willing to let go of control and admit you don't have all the answers.

“While many corporations today are beginning to realize the increasing importance of sustained innovative ability as a competitive necessity, many will find it difficult to adopt the central proposition of this book. It is not that the changes effected by the new procedures are too complex or strange — in the deepest sense, they are nothing if not natural — but they appear to threaten and run counter to familiar tactics for retaining control and avoiding risk.”

— Jerry Hirshberg, Author of *The Creative Priority*
& founder of Nissan Design International

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Layered beneath your fears - *of talking to people you don't know, ...of rejection, ...of the unknown* and the ego's desire *...to be liked, ...to win, ... to be separate* - these principles are about reaching out. Reaching out to people - some that you know and some that you don't - to see if they are open to have a conversation. And doing so in such a way that gives you the best possible chance of getting the basic truth of every opportunity: "Yes I am interested in talking further, and am open to share what's going on for us to see if we might have a fit," -or- "No I am not, at this time."

If your prospect is open to talk with you, your approach will be focused on creating an environment where they are comfortable enough they are not going to be "sold" or "manipulated" that they will continue telling you the truth about their situation. As you get them to tell you the truth, then you have a window of opportunity to concisely and meaningfully communicate who you are, what you do, and why people decide to work with you. If you are doing your job effectively, you will quickly find out if there is enough of a "fit" to move to a next step.

Everything within these pages is designed to help you execute this simple premise, *get more truth from your prospects and you will waste less time*, with optimal effectiveness. If you are open to analyze your current approach to growing your business and are interested in making fundamental shifts in your thinking, you are in the right place.

Fundamental Issues and their Consequences

With the continued emergence of a more psychologically savvy culture, there is an opportunity for change in the world of traditional sales and business communication. The sales and business communication process is more complex than ever and many old techniques and ideas are becoming ineffective and obsolete. The new levels of knowledge and complexity for both buyers and sellers also open up new opportunities to do things differently and more effectively.

All of the business professionals and organizations I have worked with have their own unique set of challenges due to specific industry dynamics and their particular corporate culture. There are, however, three areas where I find most professionals consistently lacking in optimal effectiveness.

Issue 1: Not fully understanding, believing in, or effectively communicating your unique value. Most professionals and their organizations either unknowingly discount or don't understand their own unique value and thus underestimate what value they bring to the marketplace. When I speak of unique value, I mean the reasons beneath the surface buzzwords and corporate speak that make clients want to work with you and no one else. Some of your value is obvious (i.e.: the specific performance of your products, the high levels of service and expertise your people provide, etc.). However, much of the uniqueness of what you do and how you do it is hidden beneath the surface and needs to be brought out in order to more effectively communicate to your clients. The more you believe in and can be meaningfully articulate about your unique value, the less you will struggle with...

- An overall lack of differentiation and resulting commoditization of your product or service. Getting paid less for doing the same or more work.
- Getting caught competing in the "Request For Proposal" process where differentiation is difficult. Spending a significant amount of resources on opportunities that never come to fruition.
- Competing on price and negotiating from a "One down" position without any leverage or control.
- Fear of losing the business. Getting attached to the money in a way that hampers your ability to ask effective questions or negotiate from a position of equality.

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Issue 2: Not having a client engagement process that allows you to be in control. This is relevant for processes related to engaging new prospects, re-engaging past clients, and developing more business from existing clients. Even if you have a formal company process in place, I find consistent, disciplined, day-to-day execution in the field is uneven. If you or your team are actually disciplined about your process, it is then the mental discipline (i.e.: ensuring you don't get too needy and emotionally attached) that often needs improvement, especially in high stakes situations. Without a clear and effective process that you control, you will get caught defaulting to the prospect's process. They will be the ones in control. You might have often assumed that if you don't follow every step of the prospect's process that you will lose your opportunity to win the business. I've found this usually turns out not to be true at all. Some of the symptoms of defaulting to the prospects process automatically...

- Getting caught negotiating primarily on price and other rational details.
- You are not privy to important details about your prospective new client and their process. (i.e.: when the decision will be made, who's making the decision, why they are doing this, why now, who cares, why they are considering you.)
- Getting so excited about just having the opportunity to be included in the process that you either forget or can't muster the courage to ask difficult questions that will help more quickly qualify your prospect.
- Process drags on for a long time. You are often the last to know where things are and what decisions have or haven't been made.

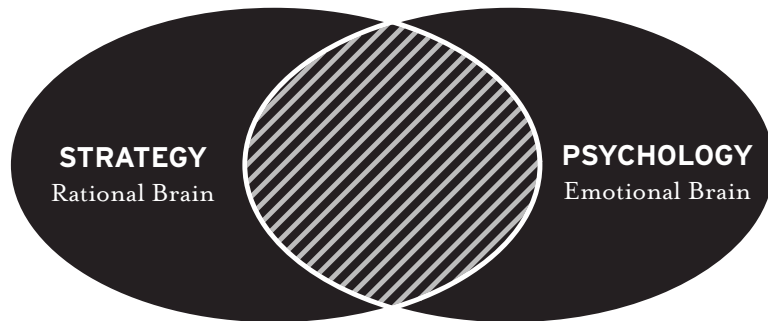
Issue 3: Emotional attachment to getting the business. This happens most often when you want and need the business more than your prospect needs to solve their problem. When you care more about closing the deal than you do about solving their problem, you get attached and lose control. You get excited and are too quick to move the process along before covering essential steps and learning the answers to key questions. When this happens, closing percentages plummet. Controlling the process, properly pacing it, and knowing when to move on and walk away is an essential discipline to attracting more of the right kinds of new business. Making sure you are never too far ahead of your prospect or wanting things more than they do will help minimize dealing with symptoms such as...

- Not getting phone calls or emails returned
- Losing status and perceived value from clients and prospects. They are put off by your actions such as calling or emailing too frequently, or how your tone of voice and message seems needy, even desperate.
- Deal is stalled or dead. Wasting your valuable time and energy on something that you got excited about too early. You've lost control yet are still counting on the deal in your projections.
- Not moving on. The energy and "headspace" you give your prospective deal that keeps you from moving on and looking for the next new prospect. Keeping you from more quickly attracting someone who has more of a sense of urgency, sees your value, understands their issues, wants to fix them, and is open to your help.

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Now that we've uncovered the core issues and symptoms, let's lay the groundwork for framing the way you look at sales and your own achievement. Before we launch into some detailed elements of how to solve these issues, I think it's important to spend some time framing out our larger models for dealing with these issues.

Let's start with a big picture "macro" framework that drives the uncovering of fundamental inefficiencies in a company's approach to sales growth. The two categories we focus on here are: Strategy (rational brain) & Psychology (emotional brain).



Strategy

Competitive organizations develop arsenals of sharp presentations, snappy value propositions, competitive positioning statements, and ever changing deal structures to enable their sales force to go out there and "grow the business."

While key to overall growth, traditional strategic "Sales Enablement" alone generates inconsistent revenue growth. This is because sales people are inconsistent at the most important and leveragable point of execution: the customer interaction. Beyond traditional sales processes and closing techniques, sales people too often lack:

- An effective vocabulary to keep from being commoditized.
- The soft skills and confidence to accurately and quickly qualify a prospect.
- The awareness and discipline to keep large customers from unnecessarily stalling a sale.

Sustainable business growth requires a sales force to combine their strategic tools with the tactical skills of awareness, mental discipline, and language within a consistent, executable process. Otherwise, growth is limited by what is in effect the "last mile" issue for every sales organization: excellent enablement but inconsistent execution.

Psychology

As the gatekeeper to the rational part of our brain, our emotional brain first attaches an immediate "tag" (i.e.: threatening vs. safe, uncomfortable vs. reassuring) to every interaction and experience we have. The sequence of this "wiring" ensures that humans are emotional creatures first. This elegant structure ends up sabotaging us professionally because those emotional life experiences that we try (mostly unconsciously) each day to either avoid or repeat end up driving compulsive reactions to specific situations; often with unfortunate results.

In business, this emotional-rational conflict shows up intensely for those involved in buying, selling, and negotiating; activities that are commonly filled with emotions such as fear, excitement, and attachment.

Business leaders and sales professionals that have a better understanding of and disciplined control over their reactions are best positioned for accelerated, sustainable growth and bottom line results. You must be committed to and interested in a framework for a more honest and "human" approach to communication and collaboration. The end result will be

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higher quality business relationships, and quicker results, with less of the pain and conflict often associated with sales and negotiation.

The “micro” framework, which explains the foundation of how to execute more effectively toward growth, focuses on three primary elements: Thinking, Language, and Process. These operate both independently and in concert with one another. When combined, you give yourself the best possible chance for an exponential shift in results.

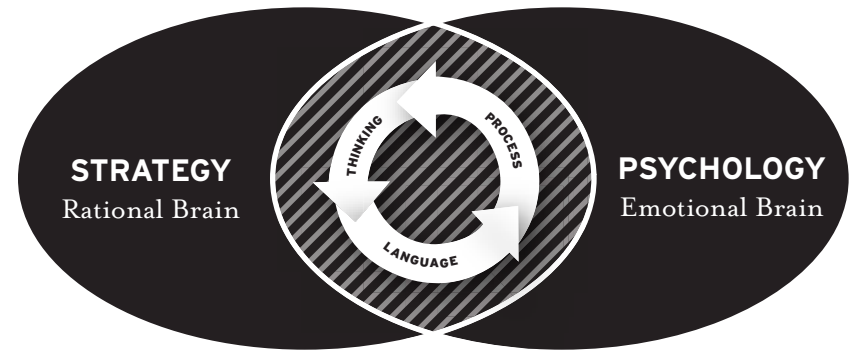
Thinking, Language, Process

Thinking, or mental discipline, is most simply defined as the ability to be emotionally aware (of any fear, or excitement) and detached (from wanting the business more than your prospect wants their problem solved). Your thinking drives your intent in all prospect interactions. If you are more focused on their money than their problems or in presenting your solution than

“Successful companies are willing and able to uncover inefficiencies and turn them into opportunities.”

uncovering their true needs and motives for change, you are operating from low intent and are out of control. This doesn't mean you won't close business, because you will (and do). It does mean that you're often not finding the right kind of business and are spending more time than you need to working on deals that end up going nowhere. Being more aware of and more disciplined about your thinking in all sales / business development situations is the first key to new levels of success.

Language discipline is focused on the specific words you use in email, phone, and face-to-face communication. These words have the ability to keep people at ease, create an environment to get the truth, and to stay in control of each conversa-



tion. Discipline of language focuses on better understanding what key words and phrases are essential to keeping you in an equal position with prospects and clients, and what words and phrases put you in a one-down position that get you lied to and commoditize you. Language is also about being able to frame your value in a unique, compelling way that others can relate to.

- Thinking drives language.
- Language is the bridge that connects Thinking and Process.
- Key words / phrases to use (not use) in order to keep on an equal footing with prospects and clients.
- Language designed to get the truth.
- Framing all conversations, expectations up front. Ensuring that “no” is ok at each step.

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Process discipline is about having a step-by-step process and guiding framework that you lead clients through. You must be clear which steps must not be skipped and when it is or is not appropriate to be flexible. Having the awareness to know when things are moving too fast and the discipline to know how and when to slow them down. And also when to (respectfully) walk away.

- Having a process for engaging new clients & getting more business from existing ones.
- Clarifying a next step at the end of every conversation.
- Following a system that allows individuals to be optimally effective, minimizing costly emotions (i.e.: fear, ego, attachment, etc.).
- Having discipline and confidence that your process is the best system for both you and your prospect to follow.

Now that I have framed out the *macro* and *micro* lenses through which to view these principles, there are also three fundamental *undercurrents* to identify. You will read more about these in the pages that follow, but because they are at times subtle, I want to point them out.

The first is the importance of being genuine; talking in a language and tone that cuts through the noise and b.s. of the typical *corporate speak / rah-rah / look at how smart I am* that is so common today. Stop playing that game. Be yourself.

The second is a fundamental shift from putting yourself in what I call a “one-down” position and communicating with prospects and clients from a position of equality. I have met very few people in business that do a good job of this.

Finally, we will talk about how people learn, grow, and change. This is relevant for you as a business professional,

and also for understanding your prospect’s mentality when they are looking to make a decision to change. The more you understand and embrace the opportunities to interrupt old patterns in order to create new results, the more effective you will also be at leading yourself and others through a healthy process of change.

Genuineness - You Can’t Fake It

At the base of these elements to sales and business communication is what I call an undercurrent of genuineness. This is not something that you can fake or learn. Sometimes it’s right beneath the surface, but is getting covered over by buzzwords, and your “professional self” that wants to sound impressive and super smart at every turn. This baseline is about stripping away all the layers of habits and mental programming that keep you from being more genuine and thoughtfully, radically honest in your business development conversations with new prospects and key clients. By “thoughtfully, radically honest” I mean to be yourself, talk like a regular human being, and to be direct in a humble yet bold way. Stop trying so hard. You can be yourself and sell your services at the same time. The two actually go hand in hand.

One-Down, One-Up, All Even

The over-arching framework for the principles in this book can be summarized by a very simple visual: $v - V$. It’s what I like to call “little v – big V .” It has been my experience that most people in any sales role (formal or informal) are unaware of the ways they put themselves in a one-down position with clients and prospects. For example, thinking, “They have the money and I want it; therefore, they are in charge.” This one-down position comes in the form of thoughts that spill over into language and process. All of this ends with you or

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your team getting caught defaulting to following the prospect's process for engagement. Before we proceeded I thought it might be useful to have an overview tool to use as a filter for yourself or your team and how you're "showing up" with clients and prospects on a daily basis.

Exercise: Visualizing our Value

Positioning Ourselves within the Conversation

		One-Down
		Concept Selling from weakness—a position of less than, “I’m just happy someone is talking to me and asking for a bid. Glad to just get a meeting.”
You	Prospect/ Client	
V	V	Language “Please call me back.” “What do I need to do to get your business?”
		Thinking I’m not worthy. Defaulting to their process. Calling at the lowest levels. Little belief in personal value.

		One-Up
		Concept Selling features and benefits. Talk 75% listen 25%.
You	Prospect/ Client	
V	V	Language “We know we can really help you.”
		Thinking “You’re screwed up and need us.” No genuine empathy for situation or person. It’s all about selling. “I can help everybody.”
		All Even
		Concept Selling from equality, believe in your personal value, company value and fit in the marketplace. Talk 25%, listen 75%.
You	Prospect/ Client	
V	V	Language “What I have found works best...” “I need to know more before I can say we are a good fit.”
		Thinking We can’t help everybody, only those open to help and exploring new approaches to what they’re currently doing. Position of high intent, looking to solve problems, and not just about closing the deal.

Opportunity to Interrupt Patterns

I have worked with numerous companies and individuals that are at pivotal points in their lifecycle. They are trying to reach the next level and the same old thinking and actions are not getting them there. They are open to new thinking about themselves, their value, and their approaches to selling and developing their people. There is missed opportunity that is causing them pain or specific things that are just not working. Something needs to change.

People are emotional creatures, not rational. My job is to help you, if you are open to it, interrupt old patterns and habits that don't serve you. In order to increase your results you must learn new ways of looking at your habits, of talking about your business, and of executing your process for engaging new clients more effectively. When you are able to make these changes, and execute more effectively over time, you begin to create new neuropathways. This actually re-wires your brain and your ability to duplicate new, more effective processes. This lays the foundation for sustainable change and more intuitive, natural execution.

There is a fine line to walk with much of what I'm suggesting in this book. The line between the approach to your thinking, language, and process that I suggest and manipulation is a thin one. Traditional sales and sales training often talk of the gamesmanship of sales. While my suggested approach to sales and growing your business could be seen as just another form of manipulation and gamesmanship, there is a difference. There is an underlying element of consciousness, goodwill, and high intent to do the right thing that keeps these approaches from being manipulative or subversive.

It's hard to do the things I suggest without having high intent. Your process will break down. Your ego will take control. People will see through the words and pick up on what's

really going on behind them if you are pushy, overly controlling, or seem to be playing games. You can sell and negotiate the way you have always done it, which is fine if you're willing to accept the same results. Or, you can consider new ways of thinking about your business, communicating your unique value, effectively controlling the sales process, and spending your time and energy. With an authentic approach, enough goodwill, and a little extra business savvy, this material should help you to be more effective and fulfilled.

Now it's time to take a good look into the mirror, on to the assessment.

ASSESSMENT / SELF-INVENTORY

*“A mirror has the quality of enabling a man to see his image in it,
but for this he must stand still.”*

— Kierkegaard

*“Not only must you play a role in solving the problem, you must be able to
acknowledge and ‘own’ your contribution to the circumstances. In other
words, you will be more powerful in solving the problem when you understand
how your actions or inactions helped create the problem. The group may
share responsibility, but each individual must shoulder his or her piece.”*

— Connors, Smith, Hickman, The Oz Principle

*“You find peace not by rearranging the circumstances of your life, but by
realizing who you are at the deepest level.”*

— Eckhart Tolle, A New Earth

Slow Down

These days we are all guilty of moving too fast, falling victim to the increasing complexity and velocity of our lives. Some of this is the reality of life in the 21st century. Some of this is just habit. Some of this is a defense mechanism; we are afraid to slow down and miss an opportunity. A reality check seems too intimidating; we’re afraid of what a good look in the mirror might reveal, both personally and professionally. So we keep going.

This process is a chance to STOP and consider you might have some habits and patterns in your life that might not be serving your best interests. Maybe there are other ways to

approach finding and engaging new prospects, growing business from existing clients, and motivating yourself and those around you.

Carve out five uninterrupted minutes to fill in the assessment below. Don’t overanalyze each question. Read it, sit for a second, and then go with your initial gut response. Does each statement ring true for you or does it seem far-fetched? The more honest you are with yourself up front, the more useful this book will be. The questions are formulated to correspond with the primary focus and teaching points of the book. Tally up your score at the end.

Assessing Your Business and Yourself

Answer each question on a scale of 1-10, 10 being mastery, 1 being struggle mightily.

- I am clear and passionate about my job / career, what I do, and why I do it.
- New business development activities energize me.
- There are more than enough prospects out there for me; the marketplace is abundant.
- I have a systematic process for finding and developing new business with new prospects and existing clients.
- I am working on the right-sized prospective accounts that will fuel sustained growth.
- I am focused and consistent with my new business development outreach.

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- ___ I have no trouble getting to the true decision makers within an organization.
- ___ There is nothing uncomfortable or stressful about selling and negotiating.
- ___ I have no doubt about the value I bring to my clients and the marketplace.
- ___ I have no doubt about the premium value of my organization and the products / services we provide our clients.
- ___ I clearly understand what kinds of challenges my ideal clients are facing and looking to solve when they hire me.
- ___ I clearly understand what kinds of opportunities my ideal clients are looking to capitalize on when they hire me.
- ___ I am able to get new prospects to quickly trust me and open up about their challenges.
- ___ I feel like I am getting the truth and the whole story from new prospects about their business.
- ___ When I'm negotiating with prospects, there aren't any questions that I am uncomfortable asking.
- ___ I am always curious, looking to solve problems. With new prospects, I have the highest intent to see if I can help.

- ___ I'm open to the possibility that I might not be able to help some prospects, or that they may not be open to my help at this time.
- ___ I have turned down business before. I am not afraid to walk away from bad business.
- ___ I never get too attached to deals and don't take "no" personally.
- ___ I have a selling method and philosophy that allows me to feel in control of the negotiating process with new prospective clients.
- ___ I do not get commoditized and pressured to negotiate on price.
- ___ My average sales cycle is the right amount length, never dragging on too long.
- ___ I do not currently have any deals in the pipeline that have stalled.
- ___ I have a high regard for my own personal value and don't tolerate being treated unprofessionally by existing clients or new prospects.
- ___ Business revenue and my personal income are at the level that I want.
- ___ I receive the kind of support I need when working on important, new opportunities. I am not doing it alone.

BARKING UP A DEAD HORSE

- ___ I am comfortable asking for help when I need it.
- ___ I feel passionate and energized by my work.
There is no negative affect on my home life.
- ___ I am not afraid to take risks.
- ___ I have no doubt in my ability to reach my short term
and long term goals.

OK, you did it. Looking back at the questions and your answers, how do you feel about your current state? Really good? Really bad? Somewhere in between? Now, add up your score and write it here _____.

250-300: You are on track or already there. You are doing most of the right things. You have most likely found your niche and established momentum in your work and life. As with anything there is, of course, room for growth. Leveraging your strengths is often the best way to focus your time and attention at this level. Get even better at the things that you already do well. Use this material to add a few new tools and perspectives for both yourself and those on your team. If nothing else, you may find reminders of what you already know but sometimes forget in your daily rush.

200-250: Relative Mastery. Just as Tiger Woods decided, at the peak of his stellar professional golf career, to rework his technique, consider an overhaul of how you approach new business development. Look at what you might need to change in order to make a quantum leap in your income and overall effectiveness. Consider ways to avoid burnout and re-energize yourself and your efforts to grow your business. Look at any long held beliefs about yourself, your business, and the

marketplace that might be limiting your ability for next level achievement.

150-200: Strong. You possess a strong foundation of overall business and sales-specific experience. There are still inefficient patterns blocking your ability to reach the next level of success and fulfilment. It may be that you need to be more disciplined and systematic about your process and approach for developing new business. The biggest challenge at this stage is often becoming more aware of your thought-patterns. Better understanding your emotions (i.e.: avoidance, attachments, fears) will help you be even more effective with your time and energy. It will also help you close more of the right kinds of new business. Willpower and hard work can help you get to this point. It cannot alone take you to the next step of your own growth and achievement. Take a look at the areas where you scored yourself lowest. These are ideal starting points for change.

100-150: Time to commit to change. If you fall in this area, you are at risk of losing yourself in what I call “*no man’s land*,” which leads to going through the motions without any sense of purpose or passion behind your actions. You may be unsure of which direction to point your career and where to focus your energy. Major shifts are needed: shifts in your thinking, daily focus, and sustained effort. In order to do this and get re-energized, you may need to make a job or career change. If radical changes are out of the question, then shifts in your thinking about yourself and attitude about your job are a good place to start. If any of this rings true, you would also benefit from a coach, counselor, or some other type of peer support / accountability group to assist you in your quest to be more effective at work and fulfilled in your life.

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Below 100: Help needed. If you score below 100, you are in the wrong job, career path, or company. If you feel that you are in the right work environment, it may just mean that you are in a new role and in an intense transition period with a steep learning curve. It might be that you're having a really bad day or month at work. Either way, your current situation and mindset are not sustainable, at least not if you want to be happy, healthy, enjoy your work, and make more money. Something needs to change. As you read further, identify the most important shift that needs to happen for you – either in your thinking or your specific approach to your job. Use this material to clarify and focus your plan moving forward. Enlist others close to you to help support you in this time of transition. Challenge yourself to make changes that are sorely needed.

This analysis is far from scientific, however, it has proven to be a useful assessment of current mindsets and overall approaches to new business development. My suggestion would be to find three key areas for improvement and develop a plan around these to improve your mindset, process, and results. Use this as a guide for what areas you focus on mostly in the chapters ahead. The more targeted and clear you are about what you need to improve, the more you will get out of this book.

To achieve real gains from this assessment, you should revisit it in 30 days and see what has improved. This assessment is meant to grow with you. Ideally, you will assess yourself, and your team if you have one, every 90 days. Do this consistently for a year and you will see significant changes in both tangible bottom line and intangible results. You can download fresh copies of this assessment at www.perficency.com/assessment.

EGO

VALUE

LANGUAGE

FRAMING

CHANGE

TAKE AWAYS

YOUR EGO COSTS YOU TIME AND MONEY

Preview Points:

- Understanding your ego and its motivations is essential for creating sustained success.
- Forcing things and holding on too tight for too long will wear you out.
- Hearing, “no” and saying, “I don’t know” won’t kill you, despite what your ego will try to tell you.

“Most organizations continue to believe that the issues of productivity, efficiency, or quality control are large enough to contain a business. These, however, are characteristics more associated with machines and hierarchical systems than with groups of human beings working together. People and ideas are less easily contained, far less predictable, and infinitely more complex.”

— Jerry Hirshberg, *The Creative Priority*

Building Your House on a Shaky Foundation

You might wonder, “What the heck does ego have to do with sales, business communication, and negotiation?” The real question should be, “What part of the sales process doesn’t involve the ego?” The ego is the driver of everything that we’re talking about in this book. It is the undercurrent behind all the key principles I have found lead to more accelerated results and sustainable change in the area of sales, sales leadership, and business growth. The ego is useful to you in some ways, and yet it is destructive in many others. Becoming more aware of when your ego is doing the talking, what it’s saying, and

why you default to it is an important first step. There are a number of specific situations in sales, negotiation, and business communication where your ego’s compulsive reactions can cause you unnecessary stress and cost you time and money.

The ego self is built upon more of a straw hut than a brick building. Even if it appears solid and strong on the surface, it can crumble at any moment. It’s always at the mercy of external influences: who’s loving me; who thinks I’m great; who am I better than; am I right; am I getting validation that I’m smart, good, sexy, cool. To better understand this, try and picture the ego as a separate thing, a little creature living inside your head. It (your ego) continually struggles to stay “alive” and in control. It is constantly working to protect itself and find ways to grow and gain influence over you and over others. For those of you well versed in Looney Tunes cartoons from the 1960s and 70s, imagine a little *Tasmanian Devil* character inside your head.

Our ego’s desire for and belief in its separation gets in the way of our ability to effectively communicate. If it can stay independent of any influence or power except its own, then it can control, never get hurt, and never be surprised. From this state, it’s impossible to be authentically curious, detached from the outcome, and listen effectively. The ego is very inefficient in its ability to drive high-quality sustainable business growth and ideal client engagements. Your ego can power achievement, but it cannot power sustainable relationships and optimal efficiency.

“What happens when people attempt to change external reality without any prior change in their inner reality, their state of consciousness. They make plans without taking into account the blueprint for dysfunction that every human being carries within: the ego.”

— Eckhart Tolle, *A New Earth*

BARKING UP A DEAD HORSE

Whether in the headlines or on a *VH-1 Behind the Music* story, how many tales of corporate, political, or celebrity scandals have you seen in the last few years? They are everywhere, and at the foundation of each is the ego. Its insatiable appetite for more, the compulsive desire for validation, and the blindness, denial, and sheer stupidity it causes eventually leads to the fall.

All this being said, I'm not suggesting that we all need to become egoless monks pacing peacefully in silence. But, the influence our ego has on our daily actions, good and bad, is crucial. Our culture pumps us with ego-based messages and weaves them into the fabric of our lives - "Hit the home run!", "Don't take no for an answer!", "We will stay the course at all costs!" You don't have to sell your expensive foreign car, move out of your nice house, or stop going to the mall. There's nothing wrong with having lots of money and enjoying nice things. The process of purchasing things, decorating a house, or driving a nice car can be stimulating, interesting, and fun. I love the freedom and flexibility that money can bring. Where we get in trouble, though, is when we get overly identified with these things, too attached to them, and afraid we might lose them. I see this happen too often in the process of selling yourself to new clients and closing the "big deal."

When driven by compulsions that we don't understand or control, we are building our success on a very shaky foundation. How many people have you seen hit it big, make lots of money, and ride high on the hog when you just knew in your gut that something was out of balance? There are thousands of examples of success built on the unstable foundation of a compulsion to be good enough or smart enough and a fear of losing it all once we get to the top. I was talking to a prospective new client recently who had made and lost \$10 million over the course of five years. Thanks to a personality that was com-

pulsively driven to please everyone, he made bad decisions and gave all his money away, to the wrong people and the wrong deals. He is now beginning to sort out the wreckage of his life and start over, both personally and professionally. The first step is understanding what happened, and taking responsibility for his part in it, and not just playing the victim of circumstance card.

"The world of ego is brittle, fragile, and insecure; it never feels really safe, and it has no lasting worth. The ego's world dies.

More often than not, it self-destructs."

— Stuart Wilde, *Silent Power*

Last year, I watched the documentary film, *Enron: The Smartest Guys in the Room*. We all know the basic story of Enron, of course. It's a tragic tale about greed and misguided intentions. As easy as it is to categorize the Enron leadership and their supporters as inherently evil, we all have similar elements in our make-up. We all have some capacity deep within us to get scared, become attached, mislead, lie, and find ways to justify our behavior. The deeper in we get, the more we are afraid to come clean. As the white lies become real lies and we get afraid of the repercussions, it gets harder and harder to just tell the truth.

One of my favorite terms to use when working with business leaders and professionals responsible for developing new business is "thoughtful, radical honesty." The more direct and transparent you are right up front with your prospective clients and business partners, the better chance you have for long-lasting, sustainable relationships. You set the tone with honest and clear agreements and expectations. Too often, this is not happening. Most people are afraid of scaring prospects away. They are afraid of what might happen if you tell them

everything about who you are and what they can and should not expect from doing business with you. What you are most afraid of someone finding out, always gets found out eventually. The inevitable just gets put off for a few days, weeks, or months. And the longer a relationship goes built upon an unstable foundation, the uglier the break-up.

The ego takes EVERYTHING personally

When people don't call back. It amazes me what a hold the ego has on us. I was speaking with a past client not too long ago who is a very successful entrepreneur. He has made lots of money and accomplished more than ninety-nine percent of the world. He was still out there selling and looking to generate more new business. He doesn't do this because he needs the money actually, but because he loves a challenge and wants to stay engaged in life and work. The interesting thing is that for such a seasoned, wise, and successful man, there was still part of his ego that had a grip on him. He said the one thing that was most impactful about our work together was that I helped him take "no" less personally. He learned to move on, let go, and not be so offended by a "no" response. His ego had an expectation of how people are supposed to act and react and when things didn't go his way, the ego would throw a fit. Gradually he gained control and now can move on to other opportunities much more easily, although he still needs a little reminder every now and then.

When someone doesn't call you back, you can't force a different outcome. You can give yourself the best possible chance to get a response and move things forward, but in the end, you cannot control the other person's behavior, level of openness, honesty, etc. Your desire to do so will cause you a lot of frustration. Focus on what you can control, learn to do that more effectively, and learn to let go of what you can't control.

"Self-importance requires that one spend most of one's life offended by something or someone."

— Carlos Castaneda

The ego is terrified of being invisible and un-acknowledged. Truth is, everyone wants to be seen, heard, understood, loved, and appreciated. There is nothing wrong with that. It becomes a problem when you are compulsively looking for that outside of yourself. You can't get from others what you're not giving to and receiving from within yourself. If you are selling, negotiating, and trying to grow your business from a place of not-good enough, you will show up that way and allow others to discount you and treat you poorly. You will chase prospective clients and potential business partnerships around who are not seeing or appreciating your value and wonder why they are not "getting it." I know none of us want to admit it, but we all do it, at some level, or have been guilty of getting caught in this trap in a personal relationship, at the office, or with a new business prospect. This aspect of the ego can sabotage and compromise your position of strength and opportunity to negotiate a solution or sale that is truly best for all parties. Any neediness, however subtle, compromises you.

That being said, this is where an *over-correction* often occurs. I see people take this to the other extreme where they act as if they don't need anyone, don't care about the business, and are "ultra-detached." Sometimes, to settle into a new way of being and doing things, there is some natural over-correction that takes place. The key here is to know that this may happen and to try and be aware of it, correcting again to a more centered position. It's ok to care. It's NOT ok to completely *not care*. Active engagement, with curiosity, focus, and sincerity is essential, coupled with a healthy level of detachment from needing / wanting desperately for a particular outcome to occur.

BARKING UP A DEAD HORSE

In new business prospecting, you are spending lots of time trying to get people to agree to talk to you and to share the truth about their business challenges and opportunities. When being driven by your ego's desire to be seen and validated at any cost, you find yourself trying to convince people that don't really see and appreciate your value. They either get it or they don't. They are either open or they are not. This is either because it's not the right time or you are truly not the right fit, or some combination. Or, because you didn't effectively communicate you weren't able to get them to open up and give you the whole truth. No matter what the reason, at some point, people are ready and open and see your value or at least are open to actively engage and talk to you in your client engagement process, or they are not. Simple as that.

Ego Wants You to See Yourself as Separate

The ego's sole purpose is to uphold the illusion that you alone are at the center of all situations and separate from other people. The ego helps construct a sense of self able to cope and keep it "together" in a complex world, keeping you from falling apart during stressful situations. Edward Edinger, M.D. speaks of our desire to protect ourselves that drives our creation of a *persona* (Latin word for an ancient "actor's mask"). This is our public face. When you under-identify (i.e.: feel too exposed or sensitive) or over-identify (i.e.: get too rigid or defensive) with this persona, you can get disconnected from what is real. It is these two extremes that cause most of the ineffectiveness in business situations, especially high-level sales and negotiations. If you are too removed from the human elements in a negotiation, you are missing a tremendous opportunity to get what you want (and to help others get what they want). When you are disconnected, it's much easier to manipulate, intimidate, withhold information, and even lie. If you're overly sensitive, you will be ripe for being swayed by others' bullying,

intimidation, and lies. There is an optimal *middle place* that is neither too disconnected nor too sensitive that is at the heart of the approach that I suggest is most effective.

"Your ability to "will yourself" toward whatever you desire. Pit bull determination. Having a strong will and being filled with resolve to accomplish inner goals is asking ego to be the guiding force in your life. I will do this thing, I will never be stupid, I will never give up. Your will power is so much less effective than your imagination."

— Wayne Dyer, *The Power of Intention*

Resisting "What Is"

Our emotions are reactions driven by the ego. The ego establishes rules. When things go according to those rules, then everything is great (happy). When the ego's idea of what is supposed to be happening is contradicted by the reality of what is actually happening, things are bad (unhappy). The more ideas you have about how things are supposed to be and what is supposed to happen next, the more apt you are to be disappointed. Unless, that is, you can find a way to control every element of your life and everyone else's around you. Sounds tiring just thinking about it, doesn't it? When you make a conscious decision NOT to react to the ego of others, particularly in business negotiation and high stakes sales situations, you will often be able to bring out more rational and even-keeled responses. As you get better at bringing this out in others, you have more of a chance of finding out what they really need and being able to help them with their problem or opportunity. You can only bring out the rational, human, even-keeled reactions in others if you yourself are conscious, aware, and thinking, talking, and acting in these same ways. You yourself must model the mindset and behavior that you want to see from others.

BARKING UP A DEAD HORSE

In addition to separation and desire, the ego's stubborn resistance to reality can frustrate you and waste a lot of time and energy. Our inflexible idea of what is "supposed to be happening" at each moment is in our minds all the time (i.e.: my coffee is supposed to be hot, my food is supposed to come quickly, there's no reason that traffic should be slowing down just because it's raining a little bit). When things don't go our way, we often can revert back to behaviors we learned as young children.

Notice when your mind throws a mini-tantrum because someone won't call you back or just doesn't seem to "get" why they need you to help solve their problems. Often, these emotional reactions of the mind cause us to do crazy things – think of the "Can't let it go, ex-boyfriend (or girlfriend)" that keeps calling and sending gifts. Most everyone has either had someone like this or has been this person once in their life. Sometimes we have to give it up, surrender, and move on – at least for the time being. I know it's not in fashion these days to say this, and there's a lot of praise for people who never give up and stay the course no matter what. I'm not suggesting you not be committed to succeeding. You can't force behaviors on other people, though. It's a fine line, but at some point, persistence becomes annoyance. No one wants to be "that guy" that just couldn't give it up and made a fool of himself with the girl that was out of his league. Sometimes it pays off, at least that's what we see in the movies. More often than not, it's a HUGE waste of time and energy, not to mention a blow to one's self image.

Don't be desperate. Don't try to intimidate, manipulate, or force. Be savvy about getting people to open up and engage with you. But if it's not going anywhere, bail out. Tell them, without annoyance or emotion, that you're going away. Then do exactly that: go away, move on. It may not be forever, but at

least for now find another opportunity to work on. Remember that right timing and having a good fit are not things you can force even though the ego-voice in your head will try and tell you otherwise.

Ego Puts Everything in a Box

The ego will also put people and situations in boxes as quickly as possible. It will tell us things are good or bad, smart or dumb, useful or useless, safe or unsafe. The ego's job, or so it believes, is to keep us safe from harm, to minimize pain, and maximize pleasure. It's constantly, vigilantly scanning for a connection to "tags" in our memories trying to ensure we repeat good experiences and don't recreate bad ones. This can be useful when sizing up situations to figure out how you're going to react, determining how much time and energy you're going to allot, and what your approach will be. Some of this is fueled by gut-level intuition and the lens through which you see the world and can be useful to help you sort out the complex demands on your time and energy on a daily basis. In sales and negotiation, we can sometimes rush too quickly to label a situation as a "big opportunity" or a "worthless dead end." Our intuition can serve us well and can also fail miserably if our emotions lead us to follow a big prospect that from the beginning was probably a dead end. It can also lead us to too quickly rule out a prospect that might in the end be a great fit.

One way to help is to have a process for key situations. To have a process for each step, guiding principle, and mindset filter you create for an RFP, new business opportunity, first meeting with a prospect, etc. Don't forget your prospect is also putting you in a "box" based on their experiences. This presents an opportunity for you to do or say something to attempt to get yourself out of "the box" they've placed you in. This can

be a new question, having a different kind of conversation, or using a more straightforward and honest manner.

The Ego Compares: Puts you in a One-Down or One-Up Position

The ego lives through comparison. It looks at others and puts one's self in either a one-down *not good enough* position or a one-up *better than* position. It is very impressed by others. It loves to worship the likes of Mark Cuban, Bill Gates, and Steve Jobs, to name a few. The more we indulge in the ego-admiring, wanting to be like them, and seeing others as *better than* or *different from* us, the further away we get from our own path of self realization and what true success looks like on our life's path. While some of this *wanting* can be a driver, it is more often a distraction. The most concerning part about this for me is that it pulls most of us away from being authentic; thoughtfully, radically honest and fully human in professional situations. Many of the thinking, language, and process suggestions in the following chapters, if followed, will help alleviate this.

As much as we try to put ourselves in an equal position in high-stakes sales and negotiation when we are calling higher in an organization (i.e.: the CEO's office instead of the purchasing manager) or working on the "biggest deal of our life," we can often get nervous and put those we're meeting with on a pedestal as better or more powerful than us. The ability to NOT do this is a learned discipline and much easier said than done. You must first be aware of this fear before you can just move through it and make the call. There is no better way to get more comfortable with this than through the repetition of practice. You have to re-train your brain and remind yourself that this person across the table, no matter what his title, size of his paycheck, or celebrity status, is a human being just like you and thus not any better than you.

Ego Argues and Tries to Convince

It takes a high level of awareness and discipline not to argue. The ego LOVES to argue and debate. It takes everything very seriously. This all comes from a wicked combination of arrogance and insecurity. Notice when you are arguing or working hard to persuade someone to see your position – especially when you are in a selling or negotiating situation. Your preaching and working hard to "get them to get it" has much less influence on their final decision than your ego would ever like to know or let you believe. Stop trying so hard.

When selling and negotiating there is often a natural gravitation towards wanting to be right, be validated, and win. If someone doesn't see things your way and doesn't see your value, the ego gets triggered. This can show up as getting pissed and, in schoolyard talk, wanting to "take your ball and go home." It can show up as a desperate and compulsive need to convince others to "get it." There is nothing that strengthens the ego more than **being right**. Being right is identification with a mental position: a perspective, an opinion, a judgment, or a story. For you to be right, of course, you need someone else to be wrong which gives your ego a stronger sense of identity.

"Force is the universal substitute for truth... the need to control others stems from lack of power, just as vanity stems from a lack of self-esteem."

— David Hawkins, Power vs. Force

A client of mine shared a story about coaching one of his co-workers. This co-worker was attempting to generate new business from a large account and was distraught after meeting with them. He felt strongly that he lost the opportunity to move to the next step and get invited back because, "I didn't do a good job convincing them of our value." My client, with some new perspective on what it meant to "sell," suggested to him that maybe it's not his job to convince anyone of anything.

He reminded him that it is his job to demonstrate the company's value as it relates to the prospect's current challenges and/or opportunities, to facilitate an open and honest discussion, and then the correct decision becomes self-evident. You either have a fit, or you don't. We all are making choices every day about what we are open to, what we want more of, less of, how we spend our time, who we align ourselves with, etc. This prospect made a choice. There wasn't any level of convincing, trying harder, selling harder, giving more information, creating cooler PowerPoints, or doing a more engaging dog and pony show that could make a difference.

Your ego thinks you should be spending your time and energy convincing people how great you are, showing how smart you are, assuming you know what's best for your prospects, and forcing your agenda and needs into the situation. At some level this can work to make you successful. It's just a lot of effort and takes a lot of extra energy. And none of it is really sustainable. You have to keep re-establishing new relationships with new clients where many of the old clients quickly fell away. You can convince, compel, and seduce people to do business with you. It's just more efficient and profitable in the short and long term if you can get THEM to convince YOU why it makes sense to do business together.

I received this note from a client who is a manager, salesperson and professional services expert the other day. She talks about this need to get others to "get it" better than I can...

"You taught me to be strong at letting go, especially with potential clients that aren't a good fit for me, are not what I'm looking for more of, are a lot of work, don't really get it and are not rewarding to help. They are good people I'm sure, but for what I'm trying to build are a waste of my time and energy... My assistant and I coined a phrase "Stop bending over backwards trying to go forward". When it's too hard, too forced, too much work, even in the name of making more money or

adding a client, it's often counterproductive, yet there is a compulsive tug within that says I must help this person in front of me, I am obligated to do all I can to help them, take them on, work hard to get them to get it. I've realized that voice does not serve me and my goals, and truthfully doesn't serve the prospective client either. So, when this happens, I call it out — to myself, and with the help of my assistant. And I push back. Push back on this thought, push back respectfully on the prospective client. At this point, they have to convince me why it makes sense to work together or I tell them maybe it doesn't make sense to move forward. Half the time, they go away, which at first was scary, but now is great, because I have room to work on more ideal clients and attracting a new prospect that is a better fit for me. Half the time they respond, shifting their attitude and actions, shaping into more of the client I need them to be to feel good about investing my time and energy in them. Either way, I win."

— Deborah Lawrence, Financial Advisor

Ego Hates "I don't know"

The ego does not want you to say certain things during a negotiation or business relationship. Most of the ideas I am offering to you are things that your ego is afraid of. Such as, "I don't have any idea if I can help you" and "I'm not sure what we do is right for you." These statements will draw others to you instead of you chasing and convincing them.

Right off the bat, when a new client asks questions like, "Why should I hire you?" or "Why do you think this project should be yours?", this is a both trap and an opportunity. It is designed to put you on the defensive and make you perform, or to "dance," as I call it. If you play this game, both your ego and your client's will jockey for position. There is no authentic connection and you will lose most opportunities to uncover the real issues and genuinely find out if you can help.

The key here is neutralizing the egos. The first pattern interrupt that is essential for these kinds of situations is to

NOT answer their questions directly, because they are not productive questions. If you answer them at the surface level they will not really give your prospect the kind of meaningful information they need to make a decision. Even though the prospect thinks they are the right questions, they can be a trap that gets you caught sounding like everyone else. And if you start answering them, you will immediately lose control and will have little chance of regaining it. The first answer starts with, “*I don’t know.*” Your ego hates this. Your ego thinks their ego is going to believe that you are weak and unsure. To the ego this is an immediate nail in the coffin – dead man walking! This kind of approach can feel very counterintuitive to our traditional desire to convince, persuade, or impress someone. Your first obligation is to be radically honest. Truth is, you do not know why they should hire you, because you don’t know enough yet about their problems, concerns, opportunities, the people who care, who makes the decisions, the levels of urgency, and what they are and are not open to. Don’t pretend that you do.

What you can give them is an idea of why your clients hire you and what they were struggling with and looking to achieve when you first engaged. You must also establish up front that, to best use their time and yours, you need to ask some questions. This conversation HAS to be a two-way, adult exchange. Do not get caught in what I call being the “dancing monkey.” The dancing monkey is there to perform on command, to submit to its master, and do anything to please others as long as it gets a few treats and some momentary admiration. If you default to your new prospect’s process and just follow along at every step of the way, you reinforce that they are the ones in control with all the leverage. The key is having a process that allows you to negotiate from a position of equality, or what I call “All-Even,” without seeming like you’re being overly controlling or difficult. We will talk more later about the detailed elements that need to come together to allow you to do this.

“No” Needs to Be Completely OK

At every step along the way of your client engagement process, there are always two possible outcomes – “Yes, let’s move forward to the next step,” or, “No, we’re done.” Both parties are making this choice at each step in the process. Especially at the beginning of a client engagement process with a new prospect, letting them know that “no” is a completely acceptable answer is essential. The challenge here is that you have to mean it.

Your ego is going to hate this. The ego thinks you’re letting the prospect off the hook and being *soft* if you give them an out. Despite what the ego will tell you, this is not the case. People always have this choice; we just don’t talk about it because we’re afraid to hear “no.” By acknowledging the obvious here (which most of your competition is not doing), you have a chance to build more trust quickly. The more trust, the more truth, and more of a chance to find out if there is enough reason to do business together. The more “ok” we can get with a “no,” the more efficient and effective we’ll be with our sales process and the use of our time and energy. This high intent, confidence, and honesty is refreshing to most. I promise that you’ll win more new business than you’ll lose with this mindset and overall approach.

Q: What do you find salespeople, business professionals most struggle with today?

A: “Being themselves and dealing with the fear of letting go of ego – for many it is probably akin to jumping out of a plane without a parachute.”

— Mark Sandler, Vice President Sales / Client Services

In summary, here are a few things to keep in mind. Seek to better understand how these show up in your day-to-day actions, how you think they help you, and how they might also hold you back. Clients often ask me to help them get rid of

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these ego-driven, compulsive thoughts and actions. To create sustained change, you cannot alter these habits, patterns, and reactions overnight. You can't just wake up tomorrow and "get rid of them." You can start by being more conscious and aware of when your ego voice shows up, and how it specifically affects your approach to negotiation, dealing with difficult situations, and developing new business. These reminders are designed to help you close more new business, get more of what you want from others on your team with less stress, and to be more in control of your results.

Key Reminders:

- Detach. This does not mean don't care. It does suggest being more aware of and working to eliminate actions and thoughts that are driven by fear.
- Learn from your mistakes, but don't dwell on them and beat yourself up. Give yourself a break and remember, "It's all learning." Be curious and interested in what you did, thought, what happened, what worked, what didn't work, and how to do it better next time.
- In sales, negotiation, and relevant life situations, let people (prospects/clients/etc.) know right up front that "no" is a completely acceptable answer. And mean it. At the same time, notice your ego's fear of giving people an "out."

- When things don't seem to be going as you envisioned, notice resistance, anger, and thoughts about the way things "should be," what's "not fair," or any other victim-inspired thoughts about what's happening to you. This is the ego throwing a temper tantrum. Only when you are consciously aware of this in the moment can you then make a choice to let it go. Awareness is the antidote that gives you the best chance to make a different, more productive choice around how you spend your energy.
- Risk not knowing – this creates the space for your prospect to come to you, give you more information, and be equally motivated to engage. When you talk too much and claim to have all the answers about everything, you will often scare new people away.
- Notice when you are chasing and reacting, or feeling scattered and anxious. Relax, slow down, talk less.
- Be normal. Be yourself. You are a valuable person. You don't need to try too hard, force things, or push to impress.

ATTACHMENT TO AMBIGUITY

Preview Points:

- Many in sales fear clarity and are unconsciously ambiguous.
- We waste energy “hoping” things are going to happen, unwilling to move on.
- Fear of “no” costs you a lot of time and even more money.

Ambiguity: Uncertainty of meaning or intention.
An unclear, indefinite, word, expression, meaning.

One of my main tasks is to help you eliminate, or at least minimize, ambiguity. I have witnessed an interesting and odd tick in most people’s mental makeup that allows them to tolerate and even create ambiguity in their lives. In sales and all new business development efforts, ambiguity can cost you significant amounts of time and money.

Many business and sales professionals have told me that, at times, they actually like ambiguity and fear clarity. If they don’t have a “no” then they are still in the game and can keep doing things to persuade someone to buy. While this is true at some level, it’s incredibly inefficient thinking. NOT taking the steps needed to get the truth about what’s going on for your prospect and finding out what they are and are not open to is a recipe for wasted time and effort. As an entrepreneur, sales professional, or anyone else responsible for developing new business, your primary job is to get the truth from your

prospects and clients as early in the process as possible. Truth is ambiguity’s *kryptonite*.

Most people who sell are deathly afraid of “no.” I’m telling you, “no” is your friend. I know that sounds crazy, especially when you have been taught to “get to yes” your entire career. If the answer is “no” then you should want to know that. You don’t want to be the last one to learn a client isn’t interested in your proposal after you’ve invested a huge amount of time and effort. The more quickly and clearly you can categorize you prospects (and clients), the more efficient you can be with where you spend your time and energy. Of course, you should always put your best foot forward and give yourself the best chance of getting a yes. I am interested in providing you with new thinking, language, and process-related tools to hear “yes” more often, from the right kinds of clients. In order to get there, you must also be willing to hear “no” and to move on.

This approach is about how to more efficiently attract the right people into your new client engagement process and more quickly move the wrong prospects out. If now is not the time or they are not a good fit, you must learn to move on, the sooner the better. This doesn’t mean you can’t ever talk to them again or reach out at some point in the future. In the spirit of minimizing ambiguity, the quicker and more effectively we uncover if you have a good fit, the better for all involved. Attachment to ambiguity and fear of truth and clarity is a thinking issue (fear of hearing no), a language issue (lack of compelling language about your value), and a process issue (no control of or vision for next steps). All of these tools are designed to assist you or your team to be clearer, more efficient with your time and energy spent in business development activities.

I would like you to consider that ambiguity is an illness - a nasty virus that you want to avoid like the plague. Become

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intolerant of it, even repulsed by it. Get vigilant about eliminating ambiguity from your business development process. Examine your tolerance for ambiguity, especially as it relates to your prospecting pipeline and new opportunities with existing clients. Are you moving things effectively *into* and *out of* your process? Are you holding on to things that are probably already dead, but you find yourself still pushing or stalling because you're afraid of hearing *no*? What is the cost of ambiguity to you in your business development efforts? Is this primarily a thinking issue, a language issue, or a process issue for you and your team? How do you contribute to things being left ambiguous? What can you do to be more specific and clearer to ensure you are moving things forward or letting things go?

“A common human and organizational habit is to dream vaguely and dread precisely. We are vague about the possibilities of future achievement; but we are precise about all the barriers, the negatives, the reasons it can't be done. These come quickly and easily to mind. Dream as precisely as you can. Dread as vaguely as you can.”

— John O'Keefe, *Business Beyond the Box*

As you read the sections that follow, be aware how ambiguity can be created in your new client engagement process and overall business communication. What's your part in that? How might you be clearer about next steps, agreements, and how you communicate? Look at where you get uncomfortable and even have some fear of clarity, asking questions, or suggesting steps that would eliminate ambiguity. Remember that even if your rational mind says, “*Well of course I want clarity and would like to eliminate ambiguous situations and outcomes,*” there is another part of your mind that actually likes things not being clear.

There are ways to facilitate a process that helps both you and your prospect get clear about whether or not you can help

them, if they have a problem worth solving, if you talking to the right person, etc. Keep in mind they are struggling with the same things you are. They often have no idea what they are doing, what they really need, and what the next step is. Your approach, if you're selling with integrity, is designed to help your prospect get clear about what they need, who else has a stake in getting their problem solved, and who is going to best be able to help them.

It's fine to be positive, but don't be naive and overly hopeful. As humans, we have quite a capacity for self-deception. It often seems in our best interest to be positive and hopeful. There has to be a balance. Just hoping something is going to happen does not get it done. Hanging on to things too long, with false hope, or unwarranted positivity is a complete waste of the valuable space in your mind. The better you can get at identifying these things inside of you and within your sales process, the more efficient, wealthy, and happy you will be.

Key Reminders:

- Notice hoping, being overly and unrealistically optimistic, holding on.
- Remember that “*Hope is not a strategy.*” (Phrase comes from Rick Page's book *Hope is not a strategy, Six Keys to Winning the Complex Sale*)
- Remember that nothing is as great as you think it's going to be, and nothing is as bad as you think it will be. Notice that pendulum swing in your emotions and in your mind. The reality almost always lies somewhere in the middle.
- As humans, we are very tolerant of and used to anxiety and frustration. Sustained happiness and ease is very difficult for most people.

EGO

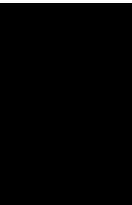
VALUE

LANGUAGE

FRAMING

CHANGE

TAKE AWAYS



UNDERSTANDING AND COMMUNICATING YOUR UNIQUE VALUE

Preview Points:

- At a deep and meaningful level, we don't understand our unique value, personally, professionally, or organizationally.
- It's impossible to attract ideal, "life changing" clients with empty buzzwords and corporate jargon.
- You must understand why your clients buy from you, in their words, and be able to succinctly communicate this off the top of your head at all times.

"Few... have grasped the full implications of their creative capabilities, restricting their application to what they make without seeing their significance to how they do it and who they are."

—Jerry Hirshberg, The Creative Priority

In my conversations with professionals responsible for growing their business I am consistently amazed that they underestimate and fail to understand their unique value. When an organization or individual is not growing fast enough and wants to attract more of the right kinds of new business, I always start at the foundation of how they talk about their value. The most successful people are clear and concise about what they do best and why it is their clients pay a premium for their products or services. In a group workshop or private session I will ask, "When you are communicating with a prospect, or referral source, how do you talk about what you do, your value?"

Q: What do you find salespeople, business professionals most struggle with today?

A: "Understanding the value of the service / product they offer. Believing in the value of their time as well as their prospect's."

— Nahme Chokeir, Vice President Client Services

I typically give the group a couple minutes to write down a few notes and then ask them to share. The responses most often include words and phrases like...

- World class
- Competitive price
- Full Service
- Passion
- Customer is King
- Innovation
- Strategic
- Out of the Box
- Customer focused
- Cutting Edge
- Quality
- Exceed Expectations
- Market Leader
- Value-Added
- Full-Service

Do any of these sound familiar? Do they appear in your presentations, on your website, or in your language when writing or talking with prospects? Ask yourself, "What do these words mean?" "What am I really trying to say here?" "What is it about our value that is most important to convey that describes who we are, how we think, what kind of work we do, etc?" Get yourself and your team on *buzzword alert*.

Below are five examples I found with a five minute search on the Internet. I'm sure you have seen some pretty bad examples yourself. If you want to share some especially poor ones with us visit www.perficiency.com/badvaluestatements.

(Company names have been changed to avoid complete embarrassment)

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“Our success is predicated on our ability to integrate our functional expertise in client services with our profound methodologies and industry experience. Our approach and process is complex and cohesive but the end results are simple. We gain market share for our clients, increase revenue and deliver substantial ROI on every engagement.”

“Bingham Associates offerings and our depth of experience reflect a commitment to improving performance. We offer a broad range of consulting services, behavioral and process skill models, and development experts with extensive backgrounds in designing solutions that support your strategies for growth.”

“Elite Management Systems is the premier provider of industry information systems. We support and sell the industry’s most comprehensive suite of software.”

“The stability of AMS solutions is legendary. We are supported by a dedicated group of well qualified people.”

“Advantis Healthcare provides society with superior products and services by developing innovations and solutions that improve the quality of life and satisfy customer needs, and to provide employees with meaningful work and advancement opportunities, and investors with a superior rate of return.”

Blah, Blah, Boring. What’s really different or unique about what you do? Often the best way to speak to this is to talk about why your clients hired you – what was going on for them in their business situation, what kinds of challenges they were facing or opportunities they were looking to capitalize on, what were they open to, and how did you help them change?

“I think most in business, and sales in particular struggle to convey the value of their company that differentiates them from everyone else. Everyone wants to say we will make you more efficient, save you money, do quality work, etc. Who does not say that?”
– Brandon Jeffress, National Account Manager

When working on helping someone better understand and communicate their value, one question I ask is, “What have your clients told you about why they bought / buy from you?” The answer most always is, “Well, we think it’s because...” or “They buy from us because...” Then I’ll repeat the question: “What have your clients TOLD YOU about why they bought from you continue to come back, and stay engaged with you?”

If you haven’t asked, ask them. It can be enlightening. Why don’t you ask? Is it because you might think it’s rude or are afraid of the answer? What is most uncomfortable about the idea of doing this for you?

Q: Why don’t you feel comfortable asking your clients why they do business with you?

A: “I’m afraid to ask—I’m just happy to have the business.”

A: “I’m afraid they will say that everyone is the same, us included.”

It is important to note that there will be times that a client gets caught off guard by these questions or even scared to have a truly honest conversation. They can easily brush this off and not give it any meaningful thought. Don’t take this personally. Some of your clients will give you insightful, thoughtful, and valuable feedback, though. It will be worth the effort.

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Concentrate on your value. Think about it, talk about it, and write about it. More than probably ever before, your prospects are overwhelmed and trying to quickly figure out if you are someone they should give any time to. It is your job to help them get a quick and meaningful understanding of who you are, what you do, and why people hire you in order to make a more informed decision about engaging in further conversation or not.

“John is a close friend of mine who owns an advertising agency in New York City. We sat down for coffee the other day with my intent of telling him about my new business endeavor and to see if he knew of anyone I should talk to. I started asking him about his business, their challenges and where he wanted to go. I asked him what they brought to the table that other agencies don’t – what differentiates them, why people buy from them. The most unbelievable thing was he couldn’t answer any of those questions. He’s the owner of the agency that’s been open for 5 years. He is scared, attached and just looking to survive. These issues are real.”
— Andrew Bogdan, Business Development Consultant

The voices, perceptions, and assumptions you have swirling around in your head are an important part of the value equation. If you are unsure of your value, then you can’t communicate it clearly to your clients and they won’t be able to get a clear sense of your value. Quick questions to ask yourself in the context of the work you do with your clients:

- What is your unique value?
- What do clients / co-workers tell you they most appreciate about you, the work you do, and how you go about it?
- In your role with clients, what strengths do you bring that are most relevant and useful to maintaining and growing the business?

- In your professional role what comes most naturally to you?
- In what situations, general or specific, have you experienced discounting your unique value?

“Your company value is led first by the value you have in yourself and your unique gifts and talents.”

Framing Your Value in the Context of Why Your Clients Hire You

Example 1: Technology Consulting Company

Things our clients are looking for when they hire us:

- They want to do more than their current tools will allow – they can’t process complex data. We solve the technical challenges with an understanding that the solution has to be simple enough for their staff to use in the future.
- They won a new project and need a team to implement / develop / support the project (usually a government customer) and think we will be successful in completing the job/solving the hard problems.
- To provide staff consultants that are either smarter or work harder (or both) than their internal resources.

Example 2: Professional Services Organization

Why clients hire us. What they are looking for that we do a good job of providing:

- They are at a critical point in their business and life (i.e.: business is changing direction, looking to take their business to the next level, facing retirement).
- Have a desire to reach new levels of profitability and growth.

- Looking for validation/confirmation that they are on the right path.
- They don't have people around them that will tell them the hard truth.
- They want a partner that will help to minimize surprises.
- Provide a sense of control and stability in time of transition and growth.
- They need more input and information to make an important business decision – it's outside their realm of expertise.
- Responsiveness – someone who will return calls immediately, follow up in timely manner, and make them feel important.

If you notice, the two lists above have framed each company's value in the context of what the prospect / client is dealing with and what they are looking for. This is a fundamental shift from jumping into telling people

how many years you've been in business, assets under management, or how many offices you have around the globe. In the end, people don't care about those things. Break your value down in meaningful terms, in the context of what your clients might be going through and can relate to. In order to create this approach, look at your current clients and why they hired you. What was going on for them that caused them to change what they were doing and who they were working with? What did you offer them that compelled them to sign up with you as opposed to your various competitors? Below are some more

"The better we can understand and connect the things that are most effortless for us and meaningful for others, the more sustainably we can grow."

specific suggestions of how you can frame YOUR value in your PROSPECT'S WORLD.

Pain-Opportunity-Open To

I find most individuals and organizations don't fully understand, believe in, or effectively communicate their value. Your value in and of itself is meaningless, unless connected to a pain or an opportunity for your client faces. There are also things that they must be open to in order for there to be any reason to move forward. On a personal level, as all organizational value gets filtered through the individual, how you see yourself is an equally important issue.

Why do your clients choose to work with you?

Audience: Who do you sell to? What specifically describes their business (*i.e.: industry vertical, revenue, geography, etc.*)?

Pain: What kind of pain are your prospects in when they hire you? What are they struggling with? What's not working for them?

Opportunity: What are your prospects looking to achieve when they turn to you? What kind of opportunities are they looking to capitalize on?

Open to: What must they be open to if they are going to be a good fit for doing business with you? What do they have to be willing to *do, think, accept, and consider* in order to be a legitimate prospect?

If there is one element from the above list that most everyone misses on this subject, it is the phrase "**open to.**" It is the least used and the most important way to frame both your value and why people buy from you –in your internal process as well as language used to communicate to clients via the web, emails, or spoken word. What happens is that you can find people that have pain or opportunities that relate to what you

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do, but that doesn't necessarily translate to them being open (i.e.: *open to...* change, talking, trying you out, giving you necessary information, letting you talk to decision makers, etc.). Here is one example from a client of mine:

When people hire us, they need to be open to:

- Sharing their concerns and problems
- Listening
- New ideas
- Change and changing their thinking
- Hard truths
- New levels of planning and discipline
- Risk
- Paying (“significant fees”) for advice
- Changing their current relationship

Ask yourself again, “What do my prospects have to be “open to” in order for us to move forward in our exploratory process and have the best chance for an optimally productive working relationship?” There are things they have to be open to, and ways they must think and act that are going to make them a good fit for you, or not. Be bold and clear about this up front in your prospecting conversations, in your written communications, and presentations. You will waste less time working with bad prospects and differentiate yourself from the competition that will all sound the same.

I imagine you may have been through some version of this exercise before. That being said, I see many well meaning, smart professionals forgetting the basics. Getting back to some simple “blocking and tackling” can help re-energize and re-focus your efforts to more quickly attract the right kinds of new clients.

I hesitate to provide too many examples in this section because the answers can be very personal and industry specific. There is no right or wrong way to do this. One of my clients answered the questions about why people hire them this way.

What are our prospective clients struggling with?

- Wasted time and money.
- Need quick turn around.
- Having trouble finishing project.
- Dealing with a downsized team. They need help – lack time, resources, and energy.
- Project they won is not in their core competency.
- They want to look good to their boss – worried about their job.

What is the opportunity that we are helping our prospective clients achieve?

- Help them win more new business from high profile key accounts.
- Help them better understand what they want and need (i.e.: sometimes they don't know).
- Can make their lives easier.
 - Meet deadlines.
 - Help them with direction, vision.
 - Take a piece of work off their plate.

What do our prospective clients need to be open to?

- Having a conversation.
- New partnerships.
- Taking a risk around trusting that we are going to come through for them.

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- Being challenged.
- Sharing responsibility.
- Meeting.

Take some time to work through this exercise and discuss it with your team. Find ways to talk about your value in more compelling, human, and tangible ways. Ask some of your best clients to help you with this process. They know you and your company as well as anyone, even yourself. Use these ideas and frameworks to re-think the language you use and how you communicate what you do and who you do it for. Instead of talking about your value and how great you are *in a vacuum*, talk about it in the context of why your clients buy from you and what kinds of things they are dealing with, looking for, and open to that led them to be a good fit. From this place your client can decide what, if anything, is relevant to their situation. Make it easy on yourself; stop selling and pushing and performing.

One final thought to end this section is to consider integrating your **observations and philosophies** into your prospecting conversations and presentations. You have been working in this field for a while now, I assume, and you have developed certain “observations” – about people, about the marketplace, about what you see works well and what doesn’t, etc. Remember that your unique perspective has value. It lets a client see how you think and what you believe, which in the end, should attract more of the right kinds of clients and projects. Sometimes in business, we leave this part out, or get afraid to share our observations. I believe sharing them makes you seem thoughtful, competent, and intelligent without being boastful. These observations you have made then drive the operating philosophies for how you do business. This is one more way to stand out as genuinely unique and compelling, without having to “sell” and “boast.” The more specific, meaningful informa-

tion you share with new prospects about why people hire you, how you see things, etc. the more quickly they are either going to be attracted to want to do business with you, or realize that you are not the best fit for them. You’re both going to find this out eventually, so why not know sooner rather than later? Take a risk. I understand the fear is that you will scare people off too early and actually have less new business opportunities. My experience tells me that the opposite actually happens.

Aren’t you tired of trying to break through the clutter of the marketplace, sounding like everyone else, when in your heart and mind you know you are different and do provide unique value? Risk being more bold and clear about who is and is not a good fit to do business with you and your organization. This kind of approach in and of itself will differentiate you from the competition, because your competitors are all struggling with these same things.

Key Reminders:

- Risk scaring prospects off with more specific, meaningful information about why people hire you – ‘spin them in’ or ‘spin them out’ and learn to be ok with either one.
- Be clear and bold about who you are, what you do and how you see things (without “selling”) – break through the clutter of the marketplace and sounding like everyone else.
- Your language, tone and overall approach with new prospects will differentiate you from the competition as much as your specific product or service.

YOU ATTRACT WHAT YOU DEFINE

Preview Points:

- Dating analogy: Find the right partner quicker. Waste less time on dates that you know, in the end, are not going to work out.
- Stay focused and specific about what you are looking to attract “more of” over time and you are guaranteed to get it.
- Minimize the buzzwords and corporate speak. Be specific, compelling, and human when you discuss the kind of new business you are looking for “more of.”

More than just getting new business, the primary obstacle and resulting opportunity I have found in my business consulting career is around generating the right kinds of new business. The profitable, growth-oriented, interesting projects and accounts that can help fuel my organization’s growth.

Ideal (*adjective*): conceived as constituting a standard of perfection or excellence: *ideal beauty*. regarded as perfect of its kind: *an ideal spot for a home*.

Are you focusing on building a pipeline of more *ideal* clients? Do you know who your *ideal* clients are? Do you know how much of your current business comes from your *ideal* clients? Do you know what percent of time and energy you spend supporting these clients compared to others? Being

clear about what *bad* business looks like is equally important to knowing what *ideal* business looks like. Sometimes knowing when to walk away is as important, and financially impactful, as closing the deal. In this age when customers have more power, it’s easy to get thrown off balance and give them control over the process, the price, etc.

There are hundreds of sales books and training programs that talk about defining your ideal client and being more bold around spending more time calling higher, leveraging your best clients, etc. I have never come across any business professional or organization that said they were doing business with enough ideal clients and didn’t need any more.

Do you know where your growth is currently coming from, or where it will come from? What current clients of yours are most apt to fuel your growth – with new business and quality referrals? Which of your current clients would you like to duplicate; to find “more of these kinds of people” to work with? At the risk of stating the obvious, your revenue, profit, and income growth is not going to come from your less profitable, more difficult, “C” clients. As you are prospecting for new business, make certain you are clear about exactly what you are, and are not, looking for. Can you talk off the top of your head with clarity and an ability to *paint a picture* of what you seek that anyone (your prospects, referral sources/network, clients) can easily understand?

Getting clear about what an *ideal* or “A” client looks like in your business (juxtaposed with a *less than ideal* or “C” client) is a simple task that I find most in business make difficult. Take some time to specifically define what kinds of people and companies you’d like to do business with. I’m sure you have done this before, but I would ask that you take it one layer deeper. The more you are reading, thinking, and talking about these things, the better chance you will have of creating the right kinds of opportunities that match your list.

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Here are a few samples of actual “A” client lists. Some of the descriptors are tangible and business-focused; others are more intangible and personalized. There is no right or wrong way to do this, use the method that best suits your needs. I find most professionals responsible for developing new business are not specific or personal enough in their descriptors of the kinds of “A” clients they would like to attract “more of.” Even successful professionals often have trouble believing they have a right to be specific and set stringent standards for what they are looking for. They are just “happy to have the opportunity to compete” for each piece of business. It has been my experience that this kind of “one-down” position runs rampant in the business world.

I offer the below real-time lists to challenge you to create an updated one of your own. I want these lists to stimulate your growth over the course of the next year. What kinds of people and organizations are you looking for “more of?” Be specific. The marketplace is abundant. There are plenty more of these out there that you are currently not doing business with. What’s holding you back?

I Am Looking to Attract “More Of...”

I find it essential to personalize this list, make it pop, come alive. You should be able to see this person, to feel and know what it’s like to work with them. I assume you have a couple of “A” clients you can model your list after. You can also create a composite description based on the traits of some of your best clients.

“A” CLIENT Example 1: Wholesale Floral & Floral Supply (Sales / Client Service Rep)

I am attracting “MORE OF”...

- 5 new customers who purchase \$10K+ per month and 10 new customers who purchase \$4K+ per month within the next 12 months, or less.
- Customers willing to engage, allow us into their business.
- Truly open and interested in doing new things.
- Are hungry for a partner and different programs.
- Bouquet makers and large scale wholesalers who service over 350 customers.

The person who created this list above at the beginning of our work together sent me an unsolicited note a year later on his progress.

“I was walking through the sales floor this morning and realized I had no time to deal with 2-3 box orders anymore (physically, not enough time in my day for it). I have way too many big customers who need me to give them attention. My next thought was... remember when you defined what you wanted? Well, it took a year or so, but I’ve got what I want (not all, but well on my way). This really works. Last year this time I sold \$125,000 for the month of March. This year, with less time and more responsibilities, I will sell roughly \$235,000.”

— Kevin Romani, Business Development Manager

**"A" CLIENT Example 2: Market Research Company
(President & Business Development Team)**

"We are looking to attract more companies that..."

Tangibles

- Conduct market research or have a need / want to conduct market research
- Decision Maker – person currently in charge of market research
- Have immediate need (within next 3 months)
- Have marketing budget of \$500,000+ per year
- Projecting growth of 20% minimum in next fiscal year
- End Users, Research Companies, PR / Ad agencies
- Established (3+ years in business)

Intangibles

- Interested in long term partnership
- Wants vendor involved in research process
- Willing to give us the time to get to know their pain and challenges
- Have not yet found effective, reliable research source for market research
- Not looking for just the best price
- Open to feedback and ideas on most effective way to conduct research
- Looking for sole / single research vendor
- Pays bills on time
- Sees value in us

**"A" CLIENT Example 3: Professional Services Firm
(Partner Group)**

New clients that are the best fit for us are...

- Big enough so they can afford us (\$5-50 million business or high net worth individuals)
- Strong industry background overall, weak in business finance
- Profitable, growing, good capital base
- Active management group involved in the business (no absentee owner)
- Ethical
- Progressive in thinking
- Willing to work with us as a team
- Want to grow, care about the future
- Open to take risks (or at least not too risk averse)
- Business owner passionate about success of product and company. View their work as important (not just a job).
- Financially healthy, solvent, good cash flow
- Use multiple services of ours and open to other work/support
- Return calls promptly and forthcoming with all the information we need and ask for
- Willing to listen to our advice and apply it
- Do not complain about money / invoices and pay in timely manner
- Fun to work with, always optimistic

BARKING UP A DEAD HORSE

"A" CLIENT Example 4: Financial Services Professional

New clients that are the best fit for us are...

- Married with children – healthy, stable relationships
- No debt or manageable debt
- \$500,000+ in assets
- Clear idea about their future
- Truly open to change and new ideas
- Listens to me, trusts my advice
- Driven, goal-oriented
- Disciplined, able to stick to a plan (no knee-jerk reactions)
- Aspirations for a better future (optimistic)
- Well-networked – will naturally refer friends, family, and colleagues

The next example is a different spin on the original idea. As you are defining and clarifying the kinds of people and companies you want to attract “more of,” it’s important to get comfortable with the idea that you have expectations of your clients. The earlier you orient them to this, the easier it will be to work with them moving forward. Your business relationship is not a one-way street. Just because they pay you for your services doesn’t mean they have all the control and call all the shots. You have solutions and resources that are valuable to them. Your time and energy is valuable.

Notice any places where you are falling into the trap of working with “C” clients that drain your time and energy and are not very profitable. I’m not suggesting that you can’t have “C” clients; I am suggesting that your business growth will NOT come from “C” clients. Growth will come from “A’s”

and maybe some “B’s” that have “A” potential. If you want to grow, take a good hard look at who your clients are and what kinds of clients you need to attract “more of” to meet your growth goals. Also consider the idea that you can “expect” things from your clients, just as they “expect” things from you. Is any of this out of balance in your business?

Example 5: Technology Company (President)

Expectations We Have of Our Clients:

- They must accept/realize that we know more than they do (in our specialized areas) and that we will use our knowledge to develop products to support their best interests. It’s better if a client doesn’t act like they know the perfect solution that we should implement or direct the tools that we would use to support them. They must trust us and our intent.
- Clients that have money to spend (not a continual battle for payment or constant negotiation on rates / level of effort). They are not short sighted about money. We believe we are a best value firm in that we provide exceptional service for a fair cost (but we are not the cheapest).
- They either need to have clearly defined requirements or give us a smaller task to define them.
- Be fun to interact with – not too stuffy yet know when to be serious about business.

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- Clients that have continual technology improvement programs - not afraid to adopt technology but are not stupid about spending money for the sake of spending. They see technology as their weapon and need to spend money wisely to maximize our effectiveness without introducing too much risk.
- Clients that either enjoy their market position or aspire to improve this position and understand that money needs to be spent in order to maintain and increase their market position.

Remember both your time and theirs is valuable. Help your clients more quickly put you in a category of “Yes, I am interested in learning more and think we might be a good fit,” or “You know what, I don’t think we are a fit.” Sometimes this will seem counter-intuitive. Attract people into your process and spin out people who aren’t good fits. You have nothing to hide and are not in the business of trying to force people into things they are not open to or interested in. The clearer you are up front about who you are looking for and what you are and are not, the less time you and your prospect will waste on “the dance.” Although simple in theory, I find most professionals who are responsible for developing business don’t do an effective job of this up front.

I prefer to stay positive and focus on what you are looking to attract, what you expect, what you want “more of,” and who you are. Occasionally, to make this point, you can also juxtapose this with a few brief, bold statements about what you are NOT. Being seemingly self critical does take confidence in your unique market position. This approach is another way to get focused on your core strengths and strategic differentiators. If there are “perceived weaknesses,” I find it’s best to get them out on the table right up front. If you speak to these

perceptions before your client does, you retain some level of control and high ground. If your prospect starts picking at you, putting you on the spot, and telling you what you don’t have, it is easy to get subservient and defensive.

If telling them what you are not scares them off, so be it. Eventually, they were going to be scared off anyway. It is better for this to happen earlier in the process, so everyone involved wastes less time.

Here is one example of some of the “what we are NOT” phrases that a professional services firm weaves into their initial conversations with new prospects when appropriate:

What We Are Not Examples

- The flashiest people with the slickest PowerPoint presentations and Fortune 500 clients.
- The cheapest.
- We do not have the highest profile national name recognition.
- We are not a good fit for startup companies.
- If our first project is something you want turned around last minute we probably won’t be able to help you.

If there is one thing that most all of my clients have in common, it’s that they are not the lowest price provider. They are competitive in their respective markets, but at times can be more expensive than much of their competition. If you are going to be more expensive, relative to what your client is used to, tell them right up front. Let them know what to expect. At least plant the seed to remind them that they are going to get lower prices from others. As long as your product / service has unique value and you are taking them through a process that helps you differentiate yourself and helps them understand why it would make sense to pay more to work with you, this will

play to your favor. If you are the lowest price provider and this is your primary selling point, you are not reading this book. I find most people and companies who can benefit from these approaches to sales, business communication, and personal achievement are providing a high quality product or service and are charging a premium for it. They have unique value, provide high levels of client service, care about what they do, and the clients they work for.

How You Are Spending Your Time & What is Your Return with Existing Clients?

“The law of flotation was not discovered by contemplating the sinking of things, but by contemplating the floating of things, which floated naturally, and then intelligently asking why they did so.”

— Thomas Troward, as quoted in *The Power of Intention* by Wayne Dyer

Putting your clients in buckets: A - B - C. Another useful exercise is to take a hard look at your clients and identify the qualities of the A's (ideal clients you want more of), B's (good clients that have the potential to be A's), and C's (lower margin, resource heavy clients you are not looking for more of). We will focus on the A's and C's. Taking a hard look at and “bucketing” your current clients will help you and improve your process for talking about and qualifying new prospects. It will help you identify the red flags to watch for that indicate a “C” client. I am assuming that in your new business efforts, you are not actively looking for more “C” clients but rather in attracting more “A” and “B” business. This is where the revenue and profitability and right projects for growth live.

Client Buckets Example 1: Defining the A-B-C Buckets

“A” Clients are:

- Consistent throughout the year.
- Open to conversation (business or personal).
- Proactive in wanting info, pricing, programs.
- Challenging (in a good way) to me.
- A “partnership” relationship.
- Respectful.
- Quality is more important than price to them.

“B” Clients are:

- Around during the holidays.
- Open to limited conversation (business only).
- More “last second” in their preparations and needs.
- A “commodity” relationship.
- Less progressive.
- Price driven.

“C” Clients are:

- Very unorganized.
- Hard to get a hold of.
- Standoffish.
- Not open to change.
- No “Real” relationship.
- Price driven.

Client Buckets Example 2: Describing the Buckets

"A" client descriptions

- Partner.
- Firm believer (advocate).
- Value us, use us on a regular basis.
- Can make decisions – they have control of the \$\$\$.
- Turn to us – we are top of mind.
Respect us and our perspective.
- Work together well – profitable for both parties.
- There is potential for growth.
- Brutal honesty.
- Low maintenance.
- Integrate us into their business.
- Demanding yet fair.

Sometimes I will skip the B's. It's most important to define those on each end of the spectrum, the clients you want more of and fewer of.

"C" client descriptions

- See themselves as superior. Unwilling to take advice/
follow a process.
- Don't recognize value.
- Don't respect what you do – no boundaries.
- Don't know what they want.
- Not communicating.
- Resource suck.
- Everything is "Wait" or "Can't wait!"
- Urgency is everything – seems like "life or death."

I had a client tell me they analyzed all five hundred of their clients. **They found that their top fifty clients provide 87% of their total business.** This group also has a higher average growth rate, 18%, than any others. This is where the growth is going to come: Developing more business from this top 10%, AND focusing new business development efforts on finding MORE of these *ideal* clients.

In the work that I do with professional organizations, uncovering nuggets like these can have a profound effect on how they organize their business and allot time and energy. My job is to challenge you to look at your business with fresh eyes and to face the harsh realities of where your growth is really going to come from and where you are currently wasting time. In my experience, the best clients that make up significant portions of a company's revenue often take significantly less time and energy proportionate to their return. You can make more money with less effort.

Not too long ago, one of my clients sent me a note about a review he had with one of his sales reps. As they dug into this particular rep's clients, they discovered that **his top two customers do 50% of his business and take up about 5% of his time.** This realization helped him re-think and focus the majority of his efforts toward developing more business within these clients as well as looking at finding prospective new clients that fit a similar profile.

Related to your "C" prospects, weeding them out means more quickly identifying the "red flags." When you are dating, you are scanning for and noting red flags. Certain behaviors (i.e.: how they dress, how they talk, what they ask, how they interact with others, personal mannerisms, etc.) are leading indicators about whether this person is a match with you or not. It's not that you can't look past them or want to judge them too harshly or too quickly. You do, however, get con-

stant clues about who this person is and whether or not you think they are a good fit for you. After a short period of time you have a really good idea if this first date will lead to second one or not. Occasionally, it turns out, you misread the cues and judge them incorrectly (or maybe they did this to you). It might take more than one date to get enough information, of course, but, the first date sets the foundation for everything that will or will not follow. It's the same when working with a new business prospect.

As you develop a healthy sense of skepticism and are not just "happy to have the opportunity" to get some new business, create your "red flags" list. What are the things you want to watch for? What are the leading indicators that you have found most often lead to someone not being a good fit? It doesn't mean you won't talk with them or consider engaging with them. It does mean that you are going to be very careful about how much time and energy you put into your preparation and interaction with them, and how flexible you are with your engagement process in relation to their process for selection. I would like you to be a little tougher on what you deem to be possible "C" prospects. You can be respectful and nice, of course. But, I'd like you to ask even tougher questions and also be willing to walk away. Remember, being willing to walk away from bad business is as important as finding good business. The two are inextricably linked.

Example of a possible "C" Prospective Client Red Flags

- "Request for Proposal" with no opportunity to ask questions or meet.
- Very quick timeline for your turnaround of RFP, yet unclear timeline for their response.
- Demanding, very impersonal.

- Cost is primary focus.
- RFP that goes out to more than three other organizations.

You Get What You Tolerate

I find that the reason most people tolerate lots of less-than-ideal clients and spend so much of time working on bad opportunities is that they don't understand their value. Look at your clients. How many of them do you enjoy working with? How many of them value your product / service, pay you on time, and are good to work with? This doesn't mean they don't challenge and push you, of course, but that they are professional, respectful, and willing to pay for your unique value.

Question: What are you tolerating?

What drives your willingness to put up with things that you probably shouldn't? I know when I get caught here, it's usually because I get attached to money and am afraid to let go. This is a trap. The more you hold on tightly to the wrong people, the wrong clients, and the wrong prospective deals, the more you hold yourself back. You get caught in a pattern of mediocrity and send a message that you are willing to tolerate getting beat down on price, treated poorly, and not paid on time. Perhaps you don't have any of these kinds of client relationships or prospects like this in the hopper. If that's the case, good for you. Consider how this might be relevant for anyone else on your team.

"People who are already successful became so precisely because they were unwilling to tolerate certain aspects of their job they didn't like. Their intolerance caused their success... The point here is simply that you will contribute the most, as either an individual performer or a team member,

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when your role closely matches your strengths, and that it's your responsibility to try to arrange your world so that it does... The most successful people sculpt their jobs so that they spend a disproportionate amount of time doing what they love... the moment you are spending less than 70% of your time on the things you love to do, identify the activities getting in the way and take action to remove them."

— Marcus Buckingham, *The One Thing You Need to Know*

Below is a note from a client that got stuck in a subservient position with walk-in clients that were not respecting her process or their client – advisor professional agreements. She realized that was putting her in a position that, in the end, didn't serve her, or her clients.

"I am here to serve my clients, and at the same time I need to have agreements, expectations, and processes in place to work effectively and keep myself sane, too. I used to tolerate clients walking in or calling and expecting service for whatever their needs were at that moment. The problem was that I was often with another client at the time or in the middle of a client-related project. I had the habit of being overly accommodating to them, to the point that it became a disruption to my day, agenda, priorities, etc. I decided to make a change and retrain my clients. Now, when they walk-in/call-in, my assistant instructs them that they need to schedule an appointment if they want to meet with me. Of course, unless it is truly something life-threateningly urgent. If my assistant determines they do not need an appointment and she can assist them, then she does so. This new process has freed me up to better focus on my immediate priorities and to be more present with and helpful to my clients."

One of the things I find when I'm in the new client negotiation process is that people tend to want to go right to the information for information's sake – *what is the price, who else do you work with, why should we work with you, what are your credentials?* Does

any of this information really help prospects understand if we have a good fit and if we can solve their problems? Do they really even know why they're asking? Aren't there some things that would be more useful to ask about, talk about, and listen for? Now, I'm not suggesting that we go back to the days of the three martini lunch and golf outings every other day. I am suggesting that there are ways to be effective and efficient with our time, while also not leaving out the human element of sales, negotiation, and business communication.

As humans, we are emotional creatures first and foremost. We have personal and emotional reasons for taking all actions, especially new ones. There are very compelling reasons we have for considering change and genuine costs (tangible and intangible) to not changing. We have fears, concerns, and excitement about new opportunities. We may be open to asking for and getting help, and at the same time we have some fear of making a mistake or getting taken advantage of. We want to make sure we get a good deal and don't want to pay "too much" for something. This can lead to significant short-sightedness on the part of the buyer. At the same time, as the seller, you have to be more psychologically savvy about what's going on for your prospects and find ways to get them to open up and tell you the truth. Being direct and genuine with a clear process will help us toward that goal.

Many business professionals spend much of their time working on the flashy PowerPoint deck and learning all the details of the prospect's business in preparation for the "big presentation." Some of this is necessary to look and sound professional, of course, but often it gets taken way too far. Sometimes what's most important is uncovering something as simple as why your new prospect is considering a change; what they have to gain or lose by doing something different. For all the time we spend feeding clients with information about how

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many gigabytes per minute our machines can process, how many advanced degrees our consultants have, and bragging about our *A-list* clients, maybe we should spend a few minutes on some simple, key questions that would help clarify if there is any kind of fit.

We will talk more in future chapters about language, key questions and having your own process for engaging new clients. This first list is designed to plant the seed in your head that it is OK to be more skeptical and strategic about your approach for engaging with new prospects. Here are some things you can say and ask to ensure right up front that you are not wasting each other's time. Some of these questions and comments are things you might actually ask or say to a prospective new client. Others are more of an ideal checklist to keep in mind, as well as things to be discussed with your team internally. Create your own version of this list when considering new business opportunities. Use your time and energy wisely. There is only so much of it to go around.

Key Questions to Establish a Good Fit

- Can we identify some problems or opportunities that you have, and can I share something about what we do that is relevant and connected to what you might need?
 - Do I trust you, like you, see that I'd like to do business with you? (Subsequently, do you, Mr. Prospect, trust Me? Do I seem competent?)
 - Do you have a truly compelling reason to change and is the cost to not changing greater than the cost to taking the risk of doing something different?
 - How do you fit into my Ideal Client profile?
 - Do I have a process for engaging new prospects and if so, what elements of my process are flexible and what elements are not?
- Do you have a process for engaging new vendor / partners and is it flexible?
 - Do you have the power to make a decision, or are there others that need to be involved and that have a stake in seeing this problem get solved or this opportunity brought to fruition?
 - Am I willing to walk away from potential business if you are unwilling to follow certain parts of my process? Do I have the courage to do this?
 - Are there any difficult conversations you, Mr. Prospect, are going to have to have with bosses, board members, and/or existing vendor / partners around making a change?
 - What is it about our conversations that leads you to think we might have a good fit?
 - What's still missing and concerns you? me? What else do I need to hear / see in order to feel comfortable about doing business together?
 - What's your lifetime value as a client to me? What's my lifetime value as a solution provider to you?
 - Is there anyone else (existing vendor/partner, peer or boss or board member) that might make a last minute push to keep things the way they are or try to save the account and the status quo? Are you prepared for that?
 - Where else am I getting pressure to close the deal? If this is happening (in my own head or from a boss, board, spouse) am I aware of how that might be affecting my ability to execute my process?

Most professionals responsible for developing new business spend far too little time working on solidifying their process and approach for engaging new prospects. Most are not aware

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of their own mindset and emotions going into an important meeting. Many have not mastered the art of asking really good questions, ensuring they are in control, and talking to all the right people. In order to generate that next level of results and success it is essential that you understand why your best clients buy from you and what situations they were in when they first decided to do business with you. It's a simple formula.

In order to grow your business, a certain amount of activity is of course important. The right kind of activity is more important. Work to develop your sense of focus and ability to communicate who your *ideal* clients are. The more precise your ability to identify and focus your plan for attracting more *ideal* clients, the more of a chance you will actually get them.

Key Reminders:

- In order to grow your business, a certain amount of activity is of course important. The RIGHT kind of activity is exponentially more important to achieve high levels of growth and maintain your sanity.
- Focus your energy and effort on thinking, writing and talking about who your ideal clients are. Notice resistance and do it anyway.
- Work on any 'emotional baggage' you might have around your worth and addiction to things needing to be hard. Use these exercises as an opportunity to acknowledge and begin making important changes in your thinking.

EGO

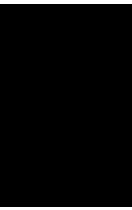
VALUE

LANGUAGE

FRAMING

CHANGE

TAKE AWAYS



EFFECTIVE LANGUAGE FOR GETTING RESPONSES & GETTING THE TRUTH

Preview Points:

- You talk too much, no matter what you might think.
- You cannot force or manipulate anyone to do anything they don't want to do.
- Find the motive for change and everything else is easy.
- Relax, lose the mask you think you need. Be genuine.

Get a Response and Get the Truth

My experience is that most business professionals are generally lazy with their written and spoken language. These busy, demanding times require a new level of awareness and sophistication in your business communication, especially in new business-related efforts. I'm going to make this section very practical, focusing on specific words, phrases, as well as email and phone language structure to guide your efforts to engage new prospects.

Business professionals are writing (emails, instant messages, text messages) more than ever before. We are also leaving more voice mail messages since it's next to impossible to catch people in their office and have them pick up the phone without an appointment. It is harder than ever to get a prospect's attention.

Email & Voice Mail Observations

Before we work through my detailed language suggestions, let me first frame out my general observations about conventional

new business prospecting communication through email, voice mail, and phone conversations.

1. Emails and voice mails are too long. They give too much information. Business and sales professionals often fear if they don't *data dump* right away, they may never get another chance. They fill their messages with LOTS of general information that the prospect either cannot process or just tunes out.
2. At the end of the email or voice mail there is no clear offer and proposed next step. If you are going to get people to respond or commit to something, they need to know exactly what they are committing to. If you are asking them to agree to something, keeping the scope of their commitment short with minimal expectations will improve your chances of getting a yes.
3. Most business and sales professionals are afraid of language that appears negative or weak. Phrases such as "I don't know," "You don't know me," "I have no idea," and "I'm not sure" can cause initial panic for those responsible for getting people to say yes. Without some version of these phrases, there is no "space" for the prospect to relax and actually listen to what you have to say.
4. Most humans have a hard time knowing when and how to "walk away." Sometimes you have done all you can. If you are not getting a response, even if they showed interest at one time, you have to learn when and how to walk away.
5. People are afraid to make anyone uncomfortable or mad. This leads to what I call an "over-politeness" in email and voice mail and puts you in a "one-down," subservient position. It can also lead to passive-aggressive communication with emotional under-

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currents that are very ineffective at getting a truthful response.

6. When in “sales mode,” most professionals feel compelled to use excited language with an overly positive tone. They feel as if they need to get people excited about their product or service and display high levels of confidence in their value. This approach often backfires quickly.
7. When in “sales mode,” most professionals get caught using leading statements intended to cajole the prospect into action. The prospect is never given an out.
8. Use of meaningless business speak, buzzwords, and other language that is missing a more human, conversational tone.
9. There is no upfront clarification of intent and expectations. When a prospect knows what to expect, they are more likely to stay open to listen to and participate in what comes next.
10. Most professionals responsible for developing new business forget that the goal and intent of an initial prospecting email or voice mail is to:
 - Get a response.
 - Get the truth.
 - Move forward to the next step -or-
Move on, go your separate ways.

The most profound change I will ask you to consider making in your sales-related communication is to STOP doing and saying the things that put you in a “one-down” position (i.e.: a position of weakness, “not good enough,” just happy to get the opportunity to win the business). Growing up, we all learned to be nice and polite, always saying “please” and “thank you.” Somewhere we also learned that in business you

have to sound excited and kiss everyone’s butt. I do not agree. I believe there are things we do and say that actually hurt our chances of getting more of the right kinds of new business. I am all for being professional and cordial, but I believe we must be more disciplined about our language and subtle messages it sends – especially since it’s harder and harder to actually speak directly to someone these days. I am interested in how we can better communicate from a position of equality with prospects and clients.

Review your email, voice mail, phone, and face-to-face communication for these words and phrases. They will not help you win more new business or negotiate from a position of equality.

Let’s get to some examples. All of these phrases and emails below were written by real people. Some are from clients of mine at the beginning of an engagement. Others are examples my clients have found and sent to me because they know I get a twisted enjoyment out of collecting BAD sales emails. Seeing some of these might make you mad. You may currently be using some of these words and phrases in your prospect and client communication. All I ask is that you keep an open mind and consider the impact that these subtle shifts in language might have on your results.

- “Thanks for your time.”
- “I would like to see if I could setup a 30 minute call with you in the near future...”
- “Please let me know if this sounds acceptable.”
- “I look forward to hearing from you!” (when you have no prior agreement or relationship)
- “The reason for my note is to request a brief 30 minute call with you to see how *&# can best support your online business needs in 2006.”

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- “I will call you tomorrow to show you how we can help you win more business.”
- “... would greatly appreciate being considered for your upcoming research projects.”
- “Thank you for taking a few minutes to speak with me today.”
- “Thank you for taking a look at what we have to offer.”
- “!” (Exclamation points)
- “Please.”
- “I look forward to working with you.” (*note: This was sent after one exploratory call and NO commitment or agreement*)
- “I wanted to let you know that we are now in a position to give you a proposal and would love to have the opportunity to do so.”
- “We look forward to working with you on this!”
- “Thank you for this exciting opportunity!” (*note: This was sent after one exploratory call and no commitment or agreement.*)
- “Thank you for the opportunity to serve you.”
- “I would like the opportunity to provide you with a quote for any upcoming projects you may have.”
- “If we are not currently working together, maybe we should be!”
- “Hopefully.”
- “I would love to have the chance to work with you.”

Bad Email Examples

Why they are bad, and things to watch for.

As you are reading these, watch for the words and phrases that put the person one-down. Use the above checklist as a reference.

Remember, these are all real emails from well-intended, high functioning business professionals and salespeople that got no response. Maybe you have never said these things or maybe you say them all the time. Either way, the more aware you can be of the subtleties of your language, the better.

Following this section, we will talk about alternative phrases and how to make these emails more effective. But first, let's focus on what doesn't work.

(Any use of company or individual's names below, have been changed so as not to embarrass them.)

Bad Email Example 1

Good Morning,

I attempted to call and speak to you personally regarding this matter.

I'd like to speak with you and set up an appointment and or demonstration with you about how our Communications Solutions can lower your total cost of ownership.

X Networks can help your company lower your total cost of ownership by combining voice and Internet service with one provider.

That's one bill for voice, broadband, conferencing, email, and Web hosting.

Voice Services include local and long distance services and free inter-office calling. X Networks can work with or replace your existing PBX or Key system.

We can reduce your total communication costs for voice and broadband while simplifying administration and management.

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Please feel free to call at the number below, should you have any further questions. I really look forward to your response. Thank you, and make it a great day!

Feedback on Bad Email Example 1

- No clear next step.
- All push, telling them what they can do, with no qualifying information.
- Assuming a response (“I really look forward to”).
- “Thank you” – for what?
- “Make it a great day” is fine for people that you know. Sounds a bit cheesy and trying too hard to be extra positive to people that don’t know you.

Bad Email Example 2

Hi Chris,

My name is Adam Brady and I am on the business development team at Pointe Solutions Research.

The reason for my note is to request a brief 20 minute call with you to see how we can better support your research needs moving forward in 2006. We’ve recently invested in enhancing our profiling, validation, and security, in addition to several other exciting improvements which I’d like to share with you.

Please let me know your availability to talk in the next week. I look forward to the opportunity to learn more about your research needs and share with you in more detail about our capabilities. My contact information is below, and I look forward to hearing from you at your earliest convenience.

Feedback on Bad Email Example 2

- Assumptive – no opportunity for prospect to be “open to” anything. All push. No reference to what the salesperson “doesn’t know.”
- No clear next step.
- “Please” is a word that people use and they are not even aware of it. In these instances, it is totally unnecessary. It is a subtle begging word.

Bad Email Example 3

Dear Linda,

Thank you for taking a few minutes to speak with me today. I’ve attached the information I promised and I will follow up with you later this week. I can appreciate your loyalty to your current vendors and thank you for taking a look at what we have to offer.

My background before working here at J&C was with a wholesaler for almost 10 years. I am very loyal to the wholesale community and do whatever I can to partner with my customers in order to maximize sales.

Have a great afternoon!

Feedback on Bad Email Example 3

- Stop thanking people for their time. Is their time more valuable than yours, really?
- Stop thanking people for looking at your stuff or considering your organization.
- No reference to any kind of near or longer term next step.

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- Exclamation points (!), unnecessary and often not genuine, especially if you don't know the person.

Bad Email Example 4

Hi Kent,

I thought I would touch base with you about the progress of a couple of things here at STR Solutions. We will be bringing the XTX Worldwide system in-house this year. It's expected to be a six month project, so we'll be looking at third quarter.

When we spoke in December you mentioned you'd be interested in a proposal for PIN-based debit processing. I wanted to let you know that we are now in a position to give you a proposal and would love to have the opportunity to do so. It hasn't been announced yet, but we are expanding our relationship with Bank American to support this additional set of transactions. I believe you said that your current contract is up for renewal in late 2006. I know most of the EFT processors require six months notice, so I suspect time is of the essence for you.

With our one-stop debit offering we can process your current networks. We are putting an emphasis on sharing with our clients the advantage of a complete brand debit strategy though. There are extremely compelling financial advantages and our proposal to you will include them. The financial advantages we can share with you will far outweigh their fee.

Stacey in my office will follow-up with you on the debit presentation and proposal. In the meantime, please don't hesitate to contact me directly if you have questions about this or other matters. We look forward to working with you on this!

Feedback on Bad Email Example 4

- Way too long.
- Uses the word "love" (i.e.: "would love to have the opportunity") which automatically puts him one-down.
- Assumptive (i.e.: "we look forward to working with you on this!") when there is no agreement in place or current dialogue.
- Exclamation points ("!")
- No clear next step.

Bad Email Example 5

Roy,

Thank you for requesting the White Paper on our Training Solutions Products. While this is an automated response from the website - I've set it up to send from my personal email. Your interest in our new program is very important to me so I've been cc'd to this note and I would love to personally follow up with you.

If you've had a chance to view the video clips, you will agree with me that this is unlike anything that the training industry has delivered before. I have personally been involved with the interventions with Yahoo!, Coca-Cola, Hilton, and Best Buy. I welcome the opportunity to connect with you for a brief conference call to tell you more about how our training program experience can work for your organization.

Please review the attached PDF White Paper and I will be in touch with you shortly. If time is of essence to you - I've enclosed both my business phone and cell for faster service.

Thank you for the opportunity to serve you.

Feedback on Bad Email Example 5

- “I would love to personally follow up with you.”
Remove emotional words like “love” and anything that seems over-eager.
- “I welcome the opportunity to connect with you...”
Assumptive, and not a clear next step.
- “I will be in touch with you shortly.”
Not a clear next step. Process is confusing.
- “Thank you for the opportunity to serve you.”
Assumptive at this stage, and places her in “One-Down” position.

I believe in selling 180 degrees differently than most have been taught. I actually believe you can sell more by not selling, not pushing, and not assuming. These emails all push and assume. Everyone in sales talks and writes too much. It is imperative that you give less info than you feel compelled to give up front. You just need to give enough to get the meeting. Offer clear and concise statements about what you do and who you do it for. Tell your prospects who you are right up front. You are trying to get them to stay open to read your email and not tune out this “salesperson” standing in front of them. As quickly as possible talk about something that might draw their attention and is relevant to their world. Don’t talk about how great your company is *in a vacuum*. Relate it to something that references your prospect’s situation. What most sales people miss is that they have no idea if this prospect is open to talk with them, or if any of this information is relevant or of interest to them. I believe it’s important to state that, or some version of it, each time.

Eliminate one-down phrases like “I would like the opportunity” and “Thank you.” Get rid of assumptive phrases like “I know there are opportunities.” You don’t know that, because

you haven’t heard from them yet. You don’t know what they care about. You “think” there “may” be some opportunities. I understand you may feel strongly about the potential relationship and the reasons why it makes sense. You may feel that you have to be bold and confident right up front to get their attention. I don’t think this works anymore. You have to temper that certainty and excitement, or your prospect is apt to immediately resist you because they sense a “salesperson” or a “know-it-all.”

Here is an effective example that takes these things into consideration. This can be used as an email, a voice mail, or during phone communication. Ideally, if you cannot speak to your client live, you can use this as a voice mail and email it immediately afterwards to increase your chances of getting a response. (*Individual and company names below have been changed to protect confidentiality.*)

Effective Email Example

Hi Nina,

My name is Jack Bowen. I am the Vice President of Client Services with T&C Floral Supplies in Philadelphia. You have no idea who I am.

We currently have a relationship with twenty Giant Foods stores in the Northeast providing regionally customized and seasonal floral supplies. In talking to some of your floral managers it seems there may be opportunities for sourcing new, unique products, developing programs, and saving you money.

I don’t have any idea if you’re looking at new products and new ideas these days or if you’re happy with what you’re doing and reaching your goals for the year.

I am writing to see if you might be open to schedule a brief, 15-

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minute conversation. My intent would be to find out if any of what we do might be relevant and helpful to reaching your new product initiatives and financial goals for '07. I will be in town next week if we want to meet briefly face-to-face, or we can also talk via phone if you prefer. Let me know either way if this is something you're open to (or not).

Sincerely, Jack

By asking if the person is “open” and using words that give them some responsibility in deciding like “might,” you set yourself up to have more of a mutually motivated dialogue. This way might at first seem weak or give your prospect an out. I can tell you from personal experience that it is the best way to ensure you get the meeting and that they are “bought in” and not cajoled or forced. The more buy-in your prospect has, the more of a chance you have of them opening up to you and sharing all the information you need. We cannot assume they are open to talk, ever.

Here is a quick summary of the “Don'ts” and other guiding principles for email and voice mail language. Which ones do you think you are most guilty of using? (*Check all that apply.*)

Email and Voice Mail Don'ts

- ___ Thank You + Thank you for your time
- ___ Please
- ___ Emotional words i.e.: “love,” “excited” or exclamation points (“!”)
- ___ Statements that put you “one-down” (i.e.: “We would greatly appreciate being considered,” or, “Thank you for the opportunity to serve you.”)
- ___ Way too much info, too long

- ___ Info about your company that is not meaningful (i.e.: “We are a clear leader.”)
- ___ Assuming that they are going to call you back (i.e.: Not giving them an out and using phrases like “if you are open to it...”)
- ___ No clear next step
- ___ Anything that is not genuine, is salesy, that you would never say normally in your personal life.

Watch your words in all your written and spoken communication. Be more aware of and disciplined about them in all client interactions.

Now, let's get into it in a little more detail. Here are some examples of a “Before” and “After.” I want to stress that there is no perfect email. Each one is different depending on the situation. I am pointing out some themes that I see in the structure of, intent behind, and language within emails and phone and voice mail scripts that I have seen from countless professionals who are responsible for developing new business.

Language That Creates Space to Get the Truth

In a moment, we'll look at some words and phrases that create space. By “creating space” I mean they minimize the automatic resistance or eliminate the wall that comes up immediately if someone doesn't know you and isn't sure what you want from them. The wall is especially quick and tough to penetrate if people think you are contacting them to “sell” them something. In sales we are often taught to use forceful, confident, and assumptive language. I am suggesting a different approach that will give you a better chance of the prospect staying open to hear your request and give you a truthful answer, as well as give you the best chance to get a meeting or next step. Creating

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space is designed to have them meet you half way, as opposed to you pushing for what you want. If we can get people to meet us half way we are much more likely to close business and waste less time with prospects that are not open minded.

I don't know about you, but I get tired of spinning my wheels. I want to deal with people that are open to talk, interested in new ideas, and have some kind of need in the areas that I can help them. The words and phrases listed below disarm people, allow them to let their defenses down, and then consider following our lead to the next step (if we both agree it makes sense to move forward). The idea is that we want to stay out of the "salesperson box" that most people get stuck in. Once you get put in that box (i.e.: you are there to push something on them they don't want or don't have time to talk about), the defenses go up and people shut down. The right or wrong word here or there can help you keep them open to considering what you have to offer, or close them off to hearing you at all (even if you might have a genuine solution to their need). Notice any judgment you (or your ego) might have to some of these words being "passive" and remember that the intent is to close more business, not less. You will have to trust me that the proper use of these words, along with the right intent, mindset, and strong client engagement process, will lead to you getting more new business from new prospects and existing clients.

For those of you that don't consider yourselves salespeople, you might find that you don't make certain calls or send emails to prospects, potential strategic partners, or referrals because you don't want to come across like a salesperson. There is no magic pill to make you comfortable reaching out to people that don't know you. Despite my experience, I still don't feel 100% comfortable doing that. I have found that some of these key words and phrases can make it feel a little more real, honest, direct, and non-salesy. This, ideally, makes you a little more

willing to engage in activity that can help you grow your business from new prospects and existing clients.

One last note. These phrases can't just be "moves" that you use. They have to be delivered in an authentic, honest, human way. Otherwise, it defeats the purpose of using them. This is really about finding words that feel natural and normal, but that you filtered out of your mind when you learned all the fancy ways to talk to business people. I'm suggesting that you strip away all the b.s. and be honest and direct with people. Yes, I want you to be savvy and sophisticated and, in the end, I want you to get more business. If you can do this in a more authentic way, you will stand out from others in your field, get more of the right conversations, find yourself avoiding business development activities less, and will feel better about yourself.

"When you lean psychologically or emotionally on people or toward them, it's a sure sign of insecurity. It makes others feel uncomfortable. They resent the weight you're laying on them, and they'll react by denying you. They don't like your self-indulgence, and your insecurity reminds them of their own vulnerability; it rattles them.

... Remember, when your energy touches others, they subliminally know if you're weak or strong — it affects how they see you."

— Stuart Wilde, *Silent Power*

The following are all phrases that have been tested in the text of prospecting emails, voice mails, phone conversations, and presentations. At first glance, they might appear "weak." As long as they are tied in with your ability to effectively communicate your unique value and deliver them from a place of confidence, they will help disarm people. Your prospects will be more apt to respond to and to open up to you with more information about what's really going on for them. Notice which ones you use (if any), as well as any strong emotional reactions you have to these phrases. They may run counter to

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all you have been taught to believe about how you are successful in the process of prospecting for new business.

- You probably don't know me.
- I'm pretty sure you have no idea who I am.
- I don't believe we've met.
- I don't think we know each other.
- You have no idea who the heck I am.
- This is a bit awkward for me, as I'm certain you don't know who I am.
- My intention is...
- Does that sound appropriate?
- If you are open...
- This is what I know... This is what I don't know...
- To best utilize your time and mine...
- What we have found works best...
- I am not sure if that is relevant to you.
- I'm not sure we can help you.
- I have no idea if any of this is relevant or of interest to you.
- I don't know if you're the person to talk to about this.
- I don't know who else might care about this issue.
- If you are open, the following works best for me...
- The next step would be.
- We are probably not the lowest price.
- If your top concern is price, we may not be a good fit, but if you are also considering..., we may be a potential fit.

- At the end of the conversation, we will find out if we may have a potential fit.
- It is perfectly okay if we decide this is not going to be a good fit.
- We are not obligated to continue.
- Might...
- Possibly...
- Perhaps...
- Either way, I wish you the best.

“Wishing you much success.” or “I wish you the best” or “No matter what, I wish you the best.” Always take the high road and wish people well, even if they don't want to talk with you further or work with you. Leave them with a positive, or at least neutral experience and memory of you and your organization.

Whenever I read this list of words and phrases out of context or imagine someone reading them for the first time, I worry that they will perceive these as counter to their sales goal which is to appear confident and strong and get the business. My intent is for you to get the business, if it's the right fit. You must first get the first meeting, and then the second meeting, and give yourself the best possible chance to get in the door and move the process forward in ways that allow you to be in control. These words and phrases need to be delivered with a certain level of clarity and confidence that still allows you to come from a position of equality. I believe you can talk like this, and do it strong and confidently, in a way that draws people to want to talk to you, to learn more, and to do business with you. I do not want you talking or appearing weak or wimpy.

Guiding Principles to Prospecting Communication

Here are a few examples of language that I've found will give you a better chance of getting a response and moving your process forward. They are more apt to disarm people and have them stay open to hear what you have to say. They have clear intent and next steps, and offer people an "out" which, in the end, gives you both a better chance of getting a truthful response and also gives you a better chance of getting a yes. Below you will find emails in three categories:

- Cold prospect
- When someone asks you to send information
- When you are at the beginning stages with a prospect or client and you have not heard back from them

The language can be used in face-to-face discussions, via phone, left on a voicemail, or in email. These will not cover all the scenarios you run into, but will give you an idea of key words and phrases we find most disarming and generate the most responses. They also give you an idea of the structure and flow of emails / communication I have found to be much more effective, especially with people who don't know you. Those who don't know you are most apt to quickly put up a wall and wonder who the heck you are. You also might want to consider how this approach to communicating could be relevant in your key client relationships, as well as when following up with referral sources.

Before we get into the specific language examples, here is the larger framework to consider the language fits in. The guiding principles to prospecting communication:

- Slow down, be clear, talk like a human being.
- Disarm up front.
- Quickly get to your point, be clear and specific about why you are calling, what you do, and who you do it for.
- Disarm them again, making no assumptions that they are interested or any of this information is relevant.
- Have a clear next step.
- Let them know you are OK either way (i.e.: if they are open to talk further, or not).

Effective Prospecting Example 1: Cold Prospect Email

Hi Tom. We have never met before. My name is Jody Hoffman and I am calling from Excell Research based in New York City.

Typically our firm works with clients who are looking for effective ways to better understand the drivers behind consumer behavior through market research. In turn our clients are then able to do things such as measure brand awareness and opinions, as well as effectiveness of advertising within the online community.

I have no idea if our company can be of assistance to you, however I thought I would call to see if you were open to a conversation. If this seems of interest or relevance to your company, the next step would be for us to schedule a brief, 5-10 minute exploratory conversation. If you're open to this, let me know. You can respond to me via phone at 800-***-5994, or you can respond to the email I sent you today with the same message.

If for some reason you're not open to talk, that's fine too. All that I ask is that you let me know either way. Have a good day.

Effective Prospecting Example 2: Cold Prospect Call

Hi Stuart, this is Lisa Tobin. First off, you don't know me. I work with a company here locally called Biotech Brand Solutions. Let me tell you quickly why I'm calling / writing.

We've been working very effectively with marketing managers at Bay Area biotech firms who are interested in building brand awareness and increasing sales. And, as a manufacturer, we've also helped these progressive-minded companies lower their overall production costs.

I don't have any idea if these topics are of interest to you or you're even the right person to talk with. I know you don't know me. I thought I'd call and see if you might be open to having a brief conversation to find out if any of what we do might be relevant.

Effective Prospecting Example 3: Cold Prospect Email

John,

Hi, This is Brad Gates. First off, I'm pretty sure you have no idea who the heck I am. I work with a company called Financial Images. We work with mid-sized brokerage firms based in Los Angeles that are growing rapidly. Clients we work with are highly image conscious and are open to new ideas about how to increase their name recognition and create presentation materials to help them win more business.

I have no idea if these are areas of interest to you. I know you don't know me from Adam. I thought I'd call and see if you might be open to having a brief conversation. At the end of the conversation, we'll have a good idea whether or not any of what we do might be relevant to you, or not.

Let me know if you're open to talk.

I recommend calling people and leaving a brief voice mail if you don't get them and then also sending an email with

the same information. In the voice mail, I recommend you let them know you also sent them an email. It gives them two modes from which to respond to you. I know you want to talk with them live, but that is getting more and more difficult these days, which is why this approach is effective. If you can't get them live, sending an email and leaving a voicemail with the right message gives you the best possible chance to get a meeting or response.

Other Prospecting Scenarios

When a prospect asks you to "Send them some information."

When at all possible, take the time to have a conversation with your prospect and not just send them numbers and information. Once you send the numbers, or any other "stuff," you lose control. Don't assume that the person that requests the information is the person making the decision; often they are not. They have just been asked to gather information. Don't just immediately default to "their process." Clarify what "your process" is for these situations. And decide what steps you are willing to be flexible about / compromise on and what ones you are not.

It's important in these situations not to get into an ego battle. Even if you have a different process and can't or won't give your client what they want, it's important for them to feel heard, even understood. If you are then going to propose your next step, do not use a tone or language that discounts their perspective ("but" or "however" – i.e.: "I understand you want information, but that's not how we work.")

When your prospect or client has a different opinion or perspective on something (pricing, your value, the market, the world, themselves, etc.), your ego will want them to conform to your view of things, and their ego will want you to conform to theirs. The challenge here, if you are not on the same page,

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is to stay engaged even though you both have different perspectives on reality and what needs to happen. To maintain control and the high ground in conversation, it's important not to jump to any immediate conclusions that either they are right and you must default to their wishes, or that you are right and they are crazy and "screw 'em." This takes awareness and discipline. Rabbi Yehuda Halevi eloquently summarized this as the ability to "**Accommodate a competitive narrative.**" By not resisting, you actually interrupt the pattern and don't give them anything to push back against. You've decided not to "dance" for them and yet also aren't pushing or forcing anything back their direction.

When they ask to send info. So, how do you push back on their request to send them something? Follow your process of not sending anything before first having a brief conversation.

Effective Declined Request for Information Example - 1

Hi Mark,

We received this email today from Karlene regarding a closed account survey.

To provide research that is meaningful, appropriate, and timely, what I find works best is for us to first have a ten minute conversation to identify your exact needs and budget requirements. Let me know if this works for you and when it would be convenient to talk.

Effective Declined Request for Information Example - 2

I have to be honest with you. I could send you a pile of information and samples, but in my experience, these materials end up on a desk / file somewhere and isn't the best use of your time or mine. I've found it most effective for us to have a brief conversation, either via phone or, ideally, face-to-face for each of

us to quickly get an idea if there is – or isn't – any kind of fit or reason to talk further. If it turns out that there's a fit, then I would be happy to provide you with whatever tools and information you need.

My offer at this point is for you to invite me in to have a brief conversation. Are you open to that?

Here is a comment from a client of mine who faced this scenario. She did a great job respectfully pushing back at her prospect's request for her to send information.

"Then he asked me what I did. From there I took control of the process. I told him that though I know he must be curious about what we provide, I would rather ask him a few questions about his business so that I could talk about our company in a way that would be relevant to his business. He had no problem with that...and from there with me asking questions... he rambled on for a good 15-20 minutes."

Effective Declined Request for Information Example - 3

I can certainly send you an overview. However, we generally find it beneficial to talk briefly first. This way we can be sure to send you information that is relative to your needs. Benchmark Resources has a wide scope of services and we often find that when we send "blanket overviews" you have to spend a lot of time weeding through material that doesn't apply to your business needs.

I recommend visiting our online website at www.XYZ.com which outlines our services and provides a recap of capabilities. This site also links you to our online resources, as well as our dedicated client site, and is a good source to get to familiarize yourself with the company.

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If you still would like me to forward you some information prior to our discussion, I can certainly do this, but because we understand that our clients are busy (as are we), I just try and make sure that we make proper use of your time.

Would any of the following times work for you to schedule a conversation?

When You Have Not Heard Back From Someone...

This is the most fun one for me. If we could pull out one section of this book that is the closest thing to a magic pill (I know I said there were no magic pills here), this would be it. Everyone who is in sales, or is working directly with clients or prospective clients, has had a situation where someone is all of the sudden not responding to them. I call these stalled or lingering deals / situations. Moving these people back into your process or off the fence and out of your process is essential as lingering deals cost you time and money. This is a delicate process. We don't want to push people too hard and scare them off, and yet we want to move things forward.

These examples are all ones that got a response. The majority of the time, the response is yes, let's move forward to the next step (they just got busy or forgot, etc.). Occasionally you will get a response of, "No, not now." We have to be ok with any answer, as long as it is the truth. The goals here are:

- Get a response where we have not received one.
- Get the truth.
- If they are open to continue, get them to re-engage and agree on a next step.
- If they are not open to continue (at this time), close the loop (for now). This frees up headspace for you and creates a consequence for them to not be moving forward.

Effective Example 1

Dan,

We had talked and you said you were interested. I have not heard back from you.

Dan. I'm sure you have lots going on. I have not heard back from you so I am going to assume that now is not a good time to talk about our services and how they might be relevant to your stated concern about business growth this fiscal year.

If I'm mistaken and you want to talk, let's schedule some time next week for an exploratory phone call. Otherwise, I won't bug you further and wish you nothing but the best.

Tim

Notice the key elements of the above email: data (no emotion, just stating the facts) and giving him an out (almost daring him to go away, taking the high road).

Response

Tim,

You're right; things have been very hectic lately. I would like to hear more about the programs that you offer and if Tuesday March 13th is good for you then we can get together over the phone. I would like to talk around 1pm, Chicago time, but if you prefer a different time I'm flexible. Thanks, and I look forward to talking to you.

Dan

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Effective Example 2

Chris,

I'm sure you have lots going on. I have not heard back from you so am going to assume that now is not a good time to talk about how our approach to Internet marketing could increase the Lightquest's online sales.

If I'm mistaken and you want to talk, let's schedule some time next week to continue our conversation or get started. Otherwise, I won't bug you further and wish you nothing but the best.

Steve

Notice the willingness to walk away. By stating, respectfully and without emotion (i.e.: annoyance), that you're going away, you give them the chance to say "No, don't go." This is often the only way to get someone's attention. It has to be done in the right way. If done correctly (like all of these examples), you will get a response in situations where you could not previously get the person to call or email you back.

Response

Steve, Sorry, I flew to New York on Friday and have been away. The answer is that I am open. I want to hear the suggestion our PR company has come up with. I have not ruled anything out yet. Let's stay in touch. I am back in town next week.
thx Chris

Effective Example 3

Rob,

The last time we talked you mentioned you were interested in getting together to talk further and have me meet with some of your new Financial Planners. Before doing that you wanted to discuss with your branch manager first. Since we last spoke, I sent you an email at the end of August and I have not heard from you.

I'm going to assume that something has changed and this is not of interest to you at this time. If I'm mistaken, let me know. I'd be happy to schedule a time to talk further with you. I'll assume we are done for now, and wish you nothing but the best. If at any point in the near future you'd like to talk, feel free to email or call at 203-***-1093.

Take care, Teri

See how she takes the high road? If they are open to talk now, a response will come. Even if now isn't the right time, this email leaves a positive emotional tag in the prospect's brain. They will remember the professionally and non-pushy way that Teri communicated. It may lead to business now, and if not now, it will lead to being considered for future opportunities. Remember, we are first selling for the now and looking for immediate opportunities. But, we are also planting seeds for the future. How we handle these situations is a chance to differentiate ourselves from the competition – talking, acting differently than anyone else. While being clear and direct and respectful.

Response

Teri,

Actually I am having my follow up meeting with my Manager on Wednesday at 10:00AM. Sorry about the delay, but the wheels

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around here grind very slowly. I don't know what will come from it, but I am planning to call you later that day.

Each of these received a response in a situation where they were not previously getting a response. I cannot say that they all led to business. I can say that they all moved the process forward to the next step. If you have any scenarios where things are stalled and you can't get a response, consider adopting this approach. You can customize the details to make them relevant to your situation. The more you read these examples, the more you get a sense of the underlying structure and guiding principles that make them different and subsequently effective.

Below is a note from one of my business partners who was working with clients on these "detachment / I'm going away" emails.

"Most business and sales professionals struggle with attachment — they can't let go. Being attached to deals that are dead and they can't seem to let go because "they're a big company and there could be lots of potential there" even though they haven't returned my 50 calls and emails. "I'm not comfortable saying that I'm going away." What has been helpful is talking through the going away emails with them and having them draft those with my feedback and sending them out. They all felt that saying they were going away was forever and that's not the case. Very simple and yet they struggle with it."

Even if your "old way" works ok for you, I'm suggesting that it's inefficient. You may very well be putting yourself in a compromising position (however subtle) and are wasting time on things that are going nowhere. You may also be missing opportunities to make a deeper connection with the right client. Everything that I'm suggesting is designed to help you to be more efficient and effective at getting more of the right kinds of conversations with more of the right kinds of clients.

Feel free to create your own version of these scripts, and see how they work for you.

Key Reminders:

- The goal is for your words NOT to sound eager or needy for your clients' business. Even if you do get the business later, it's hard to negotiate from a position of equality when you start the relationship this way.
- Remember your time is as valuable as theirs. They have challenges and you have solutions. You are reaching out to see if there is any kind of a fit. Stop thanking people for their time (i.e.: "Thank you for taking a few minutes to speak with me today"). If you want to have more control in sales and negotiations, you need to stop this.
- No begging. "Please" is a begging, pleading word. Again, I know you were taught to say please as a child. As a high level professional and adult it is seldom needed or even appropriate. Especially with people that you don't know and are not currently doing business with. If you want to be on equal ground with prospects and key clients, eliminate the word **please**.
- People are busy. Make your communication short, sweet, and to the point.

EGO

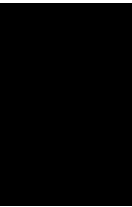
VALUE

LANGUAGE

FRAMING

CHANGE

TAKE AWAYS



UPFRONT FRAME FOR PROSPECTING CONVERSATIONS

Preview Points:

- Create a framework around every conversation and increase your chances for getting more useful, truthful information.
- Create a process where you are in control without appearing to be controlling. Speak with a focused, casual effortlessness.
- Prepare yourself for every possible question and scenario so nothing surprises you or throws you off your game.

“The prospect has his ego involved from the start as you begin to talk. Ego is pure emotion. And most of the time, it’s rooted in FEAR. That fear comes in several different areas: fear that you will do something to hurt him (psychologically), fear that you will expose his previous wrongs, fear that he will make the wrong decision, fear that by opening up to you, you will destroy his pride and dignity. It is impossible to solve an emotional problem intellectually. The part most salespeople miss is how emotional the initial part of the sales process is.”

— Bill Caskey, Same Game, New Rules,

When meeting, either face-to-face or via phone, with prospects, there is one opportunity to create an Upfront Framework for your conversation. This framework is designed to help keep you in control, put others at ease so they will share more information with you, and waste less time.

New business opportunities unfold as a series of moments. Some of these moments are more pivotal than others. You only get one chance in each moment; to start a meeting in the right way, to be in the proper mindset, to ask or be able to answer a difficult question, and in turn, get someone’s attention and concisely communicate your intent as well as who you are and what’s unique about your organization. You only get one chance to find out about people’s current business problems, opportunities, and what they are open to.

People like to know what’s coming next and where they stand. Reviewing where we are in the sales process at each step keeps everyone clear. Letting them know what to expect next keeps them calm.

In order to ensure the best possible outcome, there are a number of reminders to consider prior to an initial email, phone call, or next step in an important conversation with a client.

- Clarify Intent. Be clear with people why you are writing, calling, or meeting. Even if you think they know, don’t assume that’s the case. Make sure everyone understands where you are coming from and that there is agreement about what is to happen.
- Authenticity. Be human, personable (but not fake), honest, and direct. Show up naturally curious, interested, and ready to listen. Be normal. No need to put on a mask, try too hard, get too excited, etc.
- Being ok with “not knowing” what it is you don’t know (i.e.: What they are open to, If you are a good fit for them, etc.).
- Detachment. Be prepared and fully engaged in your conversations. In that moment, don’t spend energy worrying about whether or not this is going to lead to new business.

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- Shut up. Learn when and how to use silence appropriately. Sometimes, pausing or just not talking can be the best thing you can do.
- Know your value. Be able to clearly articulate why people work with you, what kind of opportunities you're looking to attract, and who you are interested in doing business with.
- Slow down. Take your time when preparing, talking, and asking questions. Don't move too quickly, especially if you're nervous.

As you are building out the structure for your conversations, here is a guide to what you're up against. In the end, your job is to facilitate a process, starting with your Upfront Framework, that relaxes people and gets them to tell you the truth. Many in business will naturally default to lying, withholding, focusing on price, trying to get free information, and dictating next steps. This is not because they are bad people, it's just what people do.

Their Process

- Lie or withhold information
- Use only rational, logical filters
- Get free information and consulting
- Focus primarily on price
- Prospect controls when, where
- Voicemail hell – seller is last to know

Your Process

- Upfront Frame for every conversation
- Uncovering their pains, opportunities, what they are open to

- Analyzing the economics of their pain, opportunities
- Negotiating the process for moving forward
- Presentation of final solutions

(Original introduction to the “Their Process vs. Your Process” concept first introduced to me by Bill Caskey of Caskey Achievement Strategies)

Operating with High Intent

“You must focus only on having conversations with well qualified prospects on an equal playing field. You must disarm them and be authentic and human enough to get the prospect to reveal their pain. It is then your job to communicate your value as concisely and meaningfully as possible. It will quickly become clear for both parties whether or not there is enough of a fit to talk further.”

“Sales” and “High intent” are seldom viewed as synonymous. When I ask a workshop audience to give me their initial reactions to the word “sales,” “high-intent” is never on the list. Usually the first words I hear are slimy, pushy, greedy, selfish. This is where the opportunity for differentiation lies.

I had lunch recently with a friend who is an entrepreneur and runs free seminars, providing useful information for anyone who is interested in his topic. People are always skeptical of anything that's free. They keep waiting for

him to ask for their credit card number or for the hard sell to come. But it never comes. Now, he does give them an opportunity to follow up with a meeting at a later date. He also gives them a chance to state their interest in learning more about what his company does and how it might be relevant or have an impact on their business. But, no hard sell. Providing value. No strings attached. Providing an opportunity, for those that are open to it and interested, for more information and a next step, but never any coercion or uncomfortable sales pressure.

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Intent is a challenge, even for the most high-minded of us. It is hard not to be attached to the money, the deal, the accolades, the win, the score, and the victory. I am all about winning, and what I have found is that most professionals actually limit opportunities for winning new business while pushing to make it happen. This happens when your intent is too pushy, too selfish, and you get too attached to the deal. When you are worrying more about winning and making money than you are about solving the client's problem and genuinely wanting to help them find the best solution, your winning percentage for long-term, profitable new business will significantly decrease.

Ego, fear, and greed will lead you to negotiate and communicate with prospects from a place of what I call "low intent." This solely transactional motive is all about getting the deal at any cost. This approach is manipulative, attached to one outcome only, fearful of losing, and grounded in a place of weakness. You cannot find more ideal clients that will be with you for life, pay their bills on time, and be a pleasure to work with from a place of low intent.

High intent comes from making "no" acceptable at each step of the way, asking very pointed and specific questions, being curious and genuine, seeking the truth, and caring about solving the prospect's problem (without caring more than they do).

If you're coming from the place of high intent, your mind is clear. Of course you want to close the deal, but never more than the other party wants their problem solved. And from a place of high intent, you are, in the end, ok with "no" if it is clear there is not a good fit, or they are not open to working with you. This is the hardest concept for most driven professionals to swallow and practice. Again, I'm not suggesting you not care. I am saying that most of us hold on too long and push too hard when a deal is already dead. I want you to close more deals, make more money, and help more people. There

is a way to accomplish this that uses optimal amounts of your energy, lets the prospect opt in to a process that you control, and allows everyone the best possible chance to get their needs met.

These *High Intent* conversations lead to more of the right kinds of new clients and deeper relationships with your current ones.

When you are preparing for a meeting, your first step should be to ask yourself, "*What is my intent for this conversation?*" Most everyone hates to be sold, doesn't like being out of control, and gets uncomfortable if they don't know what to expect next. Busy professionals, especially, hate wasting their valuable time.

In order to get the prospect to share openly what's going on, you need to first be clear about what they can expect. You let them know the intent (i.e.: purpose) of this meeting / email / phone call, and what you intend to accomplish, share, and ask. Also ask them what they would like to accomplish. And, at the risk of being overly specific, clarify your agreements (i.e.: how much time have we committed for this conversation) and what will be next (i.e.: what our options are for next steps at the end of the meeting). This is all designed to create what I call a safe and highly structured "container" to operate within. Once you have all the structure set up and out of the way, you and your prospect are free to have an in-depth, meaningful, human conversation. I am interested in eliminating all the little things that might be on the prospect's mind that could keep them from being fully present and sharing openly with me.

In an initial conversation the simple goal is to give your prospect an idea of who you are, what you do, and why people hire you. To ask them some questions, and be open to answering any questions they have of you. You have done this enough

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to know that 90% of the time, you have a pretty good idea within a few minutes if you might have a fit and if it's a good use of your time to continue talking. You want to be equally respectful of both their time and yours. The more clear and honest you are with people right up front, the more likely they are to return your honesty in kind. This is not guaranteed, but will give you the best chance to have a more thoughtful, productive conversation.

The clarity and quality of this interaction sets the tone for everything to come. Do not underestimate the importance of how every one of your conversations begins. In *Blink*, Malcolm Gladwell writes about doctors who were the least likely to be sued. One of the elements that proved most important was taking the time to orient their patients about what to expect during their appointment or procedure. Often people go into an important new business conversation or negotiation with little or no plan. They just “wing it,” hoping for the best.

“They were more likely to make orienting comments, such as “First I’ll examine you, and then we will talk the problem over” or “I will leave time for your questions” – which help patients get a sense of what the visit is supposed to accomplish and when they ought to ask questions. They were more likely to engage in active listening, saying such things as “Go on, tell me more about that” and they were far more likely to laugh and be funny during the visit... The difference was entirely in how they talked to their patients.”

— Malcolm Gladwell, *Blink*

Another important theme in creating an effective framework or structure to your prospecting conversations is the concept of not moving too fast. It's one of the topics in this program that inspires a “What, are you nuts!?” look from many top earning salespeople and high-profile business professionals. They want to “strike while the iron is hot” and “always be

closing.” I once told a struggling VP of Sales for a professional services firm that instead of speeding up I thought he actually needed to slow down. I thought he was throwing so much unfocused and inefficient energy toward trying to get new business (so as not to get fired) that he was much less effective than he could have been and needed to be. He thought I was crazy. And two months later, he got fired. Sometimes it's hard to slow things down when you're caught in a whirlwind of what I call “just doing what you have always done that worked pretty well up until now.”

Take a look at how world-class track coach John Smith describes how to run a race.

“Many people believe that in order to win a race, you have to be the first one out of the blocks,” says Smith. “They’re wrong. The most important thing is to execute a balanced start. The first step sets up every step that follows. If you’re the slightest bit overextended, you have to rebalance yourself – which displaces energy and sacrifices time. But if you’re balanced properly, you’re prepared to handle the choreography that will allow you to win.”

Every conversation in your new client engagement process should begin with you, the professional expert, FRAMING the conversation. Although we mentioned this a couple of paragraphs earlier it bears repeating. Framing the conversation includes things such as: giving everyone an overview of your understanding of why you're talking, what the intent is for the conversation, basic details of what to expect, how much time is allotted, and what the options will be at the end of the conversation. In many ways, these reminders are all about getting “back to basics.” It is easy to get caught up in so many other details and move quickly ahead to what you want to tell the prospect that you can forget about the basics of creating a clear Upfront Framework first.

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When you start by framing the conversation, you establish three things.

- You are in control (without being controlling).
- Your intent for a transparent and truthful conversation.
- You are OK with any outcome: yes let's move forward –or– no, let's not.

The art of *framing* your conversation makes you appear casual, and friendly, while at the same time maintaining an underlying structure. You are clear about the purpose and intent of every interaction. You show confidence and are in control, while also being flexible, humble, and open minded within your structured approach. The better you are at executing this approach, the more of a chance you will have of getting the truth from your prospects and clients in a short period of time.

I was working with a client around just this issue. She has been working with me for a couple of years, yet got a little lazy lately with a couple of high level prospecting conversations. For example, she launched into her pitch and forgot to set the stage with a framework (i.e.: why we're talking, what she's interested in sharing as well as asking, what comes at the end, etc.). Her client was a bit confused and the whole call was very unfocused. I reminded her that the upfront frame is as much for her as it is for her client. Here's where the resistance comes in. The ego within your mind wants you to trust your assumption that the other person knows why you're meeting. The ego hates to risk stating the obvious. It doesn't want the other person to think, "Duh! No kidding! Of course!"

I believe you are much better off assuming that no one is certain about the intent of the meeting. You have to continuously start over, even in mid-process, with multiple conversations, restate your intent, and clarify mutual expectations.

This ensures you have a focused, productive conversation that also happens to establish your capability, strength, and equality with your prospect or client.

Notice any assumptions you make about what they think or know and any fear you have about possible awkwardness in using some version of an upfront frame. I have never once had a prospect in my own business or with one of my clients respond to an attempt at an Upfront Frame with a negative or uncooperative comment. It's kind of a no brainer, really, if you can get past your ego's fear of looking like a moron. Ego hates what it would call "stating the obvious." You are not a moron. You are a smart, thoughtful person that is looking for the best way to use both your prospect's and your own time. You have experience with what's effective and what wastes time. You are risking stating the obvious, and have good reason for doing so. Anyone who reacts poorly to that is obviously not someone you would want as a client anyway. So, follow the process and always frame your conversation up front in some way.

Effective Upfront Frame Samples - How to start a meeting

** Disclaimer:* When starting a meeting, my intent is always to come across as casual and non-scripted as possible, while also adhering to some form of an upfront frame that sets the structure for the conversation. These examples might seem a little "stiff." They are not designed to be recited or read like a monologue. I trust you will find your way to integrate some of this language and intent into your own style and approach.

Sample Upfront Framework 1: New Prospect

My intent for this call is to give you a better sense of what we do, how we think, and why people hire us. I also want to find out a little more about your organization, what's working, what's not, as well as better understand your role. At the end

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of our scheduled 30 minutes, we should have a good idea if we have any reason to talk further. If so, we can discuss what a next step would look like. If not, then neither of us will have wasted much time. Does that sound fair?

Sample Upfront Framework 2: New Prospect

What I'd like to do is ask you some questions about your organization and some of the challenges you have. And for you to feel free to ask about us and what we do. At the end of our time today, we can decide if there is any reason to talk further. If there is, we can discuss where we go next. If not, that's fine. Are you ok with that?

Sample Upfront Framework 3: Past/Current Client

What I thought we would do today first is recap our history together. Then, I'd like to ask you a few questions about what prompted you to invite me in today. Then, I'll open up for any questions you might have or to discuss any lingering issues.

At the end, we should both have a good sense if it makes sense to talk further. If we both agree it does, then we can discuss the next steps. And if either of us thinks there's not a fit here and no reason to talk further, that's fine too. I'll be on my way and neither of us has wasted much time. Does that seem appropriate?

In first meetings, there is often a compulsion to show the prospect too much. Be aware of this urge. Ask questions, probe, and gather information. Talk less – if you're talking more than them, you're dead. Notice any attachment to the outcome of the meeting. Be curiously interested in the people across from you and whether or not you might be able to help them. Most of all, have fun; be human.

Your job is to have conversations with qualified prospects on an equal playing field, disarm them enough, and be human enough to give yourself an opportunity to hear them reveal their pain. Communicate your value in a concise, relevant, and meaningful way and then together decide if there is any kind of fit or reason to talk further. That's it.

If you have enough of these conversations, are unattached, are being yourself, and follow your plan, you will significantly increase your results.

Reminder: You & Your Time Are Valuable

As you are having conversations with new prospects, past clients, and current clients, keep in mind that you have a short period of time to give and receive a lot of substantive information. The more prepared you are and the better you frame your conversation, the quicker and more efficiently you can get into a meaningful dialogue. People will respect and appreciate this approach. All this doesn't mean you can't also be conversational and human, of course. That being said, your job is to help them understand the value of the service you offer, in the context of their world (what's working for them, what's not work, what's important to them, etc.), not your world. By focusing on qualifying the opportunity rather than just trying to close a sale, you create an environment of trust. Instead of being part of the problem and overwhelming prospects with massive PowerPoints and data, we learn to focus on the issues at hand and to help the prospect understand the extent of the problem and how we might be able to help them.

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Key Reminders:

- Being detached from the outcome helps you focus on getting the truth.
- Be authentically curious about better understanding your client's issues, opportunities, and whether or not you can help them.
- The more *emotional* and *personal* you can get, the better chance you will have at helping others solve their problems.
- Have a *qualification mindset* for every call. Remember you are interviewing them for fit as much as they are you. Notice when you're just happy to get an appointment and have someone talk to you.
- Act normal. Although you are executing a process that has structure and scripts, your job is to be *normal*, matter of fact, and conversational. Notice when you sound or your delivery feels forced.

CURIOSITY & KEY QUESTIONS

Preview Points:

- You can't fake asking good questions or being authentically curious and interested.
- Not knowing is perfectly OK and often puts you in a position of strength, despite what you might think.
- The more excited and pumped up you are, the less you're able to listen effectively.

Curiosity Can't Be Faked

Be curious and obsessed with finding the truth. Ask good questions. Actually listen to the answers.

As a professional responsible for getting new business, you should be obsessed with one thing: The Truth. Nothing else is really important. In a typical selling relationship you often have critical information withheld or even get lied to. The only way to get the truth about your prospect's situation is to ask in a way where they understand your intent and that it's safe for them to give you all the information you need. I believe when you ask thoughtful, meaningful, well-crafted questions that you will uncover more opportunities to solve people's problems, get more clients, and subsequently make more money. Your questions, ability to listen, and genuineness throughout the process will help differentiate you from the competition.

Think about the quality of a recent conversation with a prospective new client. Did you ask thoughtful and sometimes challenging questions? Did you truly listen to the answers?

Did you have some sort of structure to your conversation (i.e.: how you started it, what you asked, how you wrapped it up and clarified the next step)?

Controlling Adrenaline

The more excited or nervous you are, the less you are able to listen. I'm sure you have your own tricks for calming down and staying focused during stressful encounters. When your heart is pumping and you're feeling excited (or scared), you are able to give information (output), but struggle to take it in, process it, and integrate it into your responses spontaneously (input, input-output). By showing up and appearing calm with a new prospect, you send a message to the prospect that you are not a threat and are not needy of their business. Too often people show up looking, acting, and talking a bit like a predator stalking its prey. They are selling hard, pushing, and even showing off. You may not act like this, but I'm sure you've seen professionals who do. On the flipside, sometimes professionals who are responsible for developing new business but do not consider themselves salespeople show up too passive, low-key, and aloof (at least in appearance).

The key is to find an optimal middle place. When I think about what that means for me when I am meeting with a big, new prospect, I want to be confident, clear, and have a good sense of my value. I also, at some level, want to not really care whether I get their business or not. I am interested in helping them uncover their problems and opportunities and finding out if we might have a good fit for working together. I am not particularly worried about the outcome. If I am, I must fake it. I am most interested in having productive, meaningful conversations. I trust that in the end, this will lead to plenty of the right kinds of business for me and my organization. Despite my efforts to find evidence to the contrary, this approach has always successfully worked in my favor.

What I Know, What I Don't Know

Too many people are trying way too hard to be someone they think others want them to be. Business-speak, buzzwords, posturing, and fake sincerity are rampant at work – and especially in sales. The greatest asset you have in sales situations is you. Some are going to like you and your approach and want to work with you. Some are not. The clearer you communicate the following things to potential and current clients, the better off you will be.

- Who you are.
- How you work.
- What you believe.
- What you and your company are good at.
- What you and your company are not as good at or don't focus on.
- Who you want to work with, find to be the best fit.
- Who you don't want to work with, don't find to be a good fit.

“At the end of the day, having high intent makes you feel good about who you are and how you are going about your business.”

Be human. Be honest. Don't b.s. people. They see right through it. If you don't know an answer, say you don't know. You don't have to have all the answers. People find candor, clarity, and humility quite refreshing – especially in business and sales.

The framework of “What I know” and “What I don't know” can be an effective way to disarm a client and still come from a position of strength. This also sets up the important questions that you need to learn the answers to.

Things you know are irrefutable facts, or data. You might say you “I know we are a great fit” to a client if you are just meeting them. You might think this from your perspective,

but you do not really know this to be true. Be direct and clear with yourself and with the others about what you don't know. There is nothing wrong with not knowing. These statements, if done in a clear and confident tone (not apologetic and weak), can actually reinforce your position of strength and equality. Talking like this will also differentiate you from the competition because no one else is talking like this.

To be done effectively, the details of an exercise like “What I know / What I don't know” need to be specifically custom to your situation. There will obviously be detailed questions you have that are not represented below. This template is designed to get you thinking in this way. Use it in any way you like to help guide your key questions and overall process with new prospective clients. I have filled a few examples just to give you an idea of the kinds of things you could include. There are no real limits or boundaries to what goes in this list of what you know and don't know. Make it your own based on your real-time situations.

What I Know

- You have told me you are in a hurry
- We worked with you on a project two years ago
- You say your budget is \$20,000
- You say an important client relationship is on the line for you
- You want a proposal by end of day Friday

What I Don't Know

- Who else has a stake in this getting solved
- Why you are considering us again now
- How you decided on that figure
- What's it worth to save them and keep them happy
- If you are open to have a conversation first

“In our culture we’ve been conditioned to look at not knowing as something unacceptable and bad; it’s some kind of failure.”

— William Arntz, Betsy Chasse, Mark Vicente,
What the Bleep Do We Know!?

Maybe you think you can help your prospect with their big project because you’ve done similar projects before and it seems like a “no brainer” to you. That being the case, there are always things (in your first couple of conversations) that you don’t know: the project details, timelines, who else they are talking to, who else is involved in this decision, who else has a stake in getting this project done on time, etc. So, as much as you are confident in yourself and your company’s ability to deliver, it’s important to throw in a word here and there that creates “space” so you don’t sound too assumptive, overly eager, or over-confident (even boastful). You can be strong in how you show up, and talk about your competence, experience, and perspective. At the same time, especially early on in your process, it’s important to not get too far ahead of your client, not to sell too hard and too fast, or you will trigger resistance. Or worse yet, you will get them so excited that they move too quickly in their process and get caught up in the moment with you, only to pull back later. Here are a few words that create space and minimize resistance:

“If you combine the right intent with a clear and effective process, you will make quantum leaps in results.”

- Might
- Not sure
- Open to
- Could
- Possibly
- No idea

Key Questions

Q: What do people in sales, business most struggle with?

A: “ They avoid asking the tough questions and having a real conversation ... that helps truly qualify the opportunity. They avoid because this might lead to a “no” in just a few minutes. They want to keep hope alive as long as possible. On top of that, most salespeople are not prepared in advance, they have no concept of what questions they will ask, or what they want to leave the room with, or what their next step is. This is what they struggle with: fear. Fear comes from being unprepared, from the unknown.”

— Bill Crouch, National Sales Director

There is nothing more important in the process of selling and serving clients than asking good questions. I’m sure there have been thousands of books written on the subject. It’s one thing to be curious and ask questions, it’s another to ask the right questions, at the right time. There are some questions we are comfortable with and easily ask all the time. There are other questions that we think about, but don’t ask. Why is that? Because we are uncomfortable. We don’t want to put anyone on the spot, appear rude, or are afraid of the answer. In order to close more deals, you have to say things that your emotional brain will fear might jeopardize the deal and risk making someone mad. It has been my experience that it’s actually more risky to NOT ask these questions. If you don’t have certain information early on in your process, you risk wasting a lot of time and energy on something that has a very small chance of ever becoming new business.

“The ultimate solutions to problems are rational, the process of finding them is not.”

— John O’Keefe, Business Beyond the Box

Before we go further, create a list of key questions you always want to have answers to from a prospect before doing a presentation / proposal. Notice which ones are easiest for you

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to ask and get answers to and which ones feel slightly uncomfortable and are hard at times to get answered.

Key Questions to Ask

In a little bit you will have a chance to check these out against some of the questions that I find most helpful and effective. What I'm most interested in is that next, most uncomfortable question that needs to be asked. It needs to be asked but you are afraid to ask, or you are just not sure how to ask it, and so you give up and don't bring it up. This is usually the question that has the most potential to *quickly* spin a prospect out of your process (i.e.: not a good fit or worth pursuing further). Subsequently, it also has the best chance to deepen your dialogue and *spin* them further into your new client engagement process. It takes courage to risk more quickly *spinning* someone into or out of your engagement process. Most people like to hold onto a prospect as long as they can, "hoping" that something will happen, even if they know in their heart and mind that they are not a good fit or are not ready to make a change at this time.

The key questions listed below can be delivered in written or spoken form. Some of the questions need an intro or buffer of some kind before you launch into them. The important thing

is not walking through this list, but ensuring that you identify the key questions that are essential to get answered during your process. Be honest with yourself about the ones you are most comfortable and uncomfortable asking. It is essential that you understand the intent and reasoning behind asking each of these questions. There must be a reason for asking each question, besides you wanting to sell them something, right? Asking a certain question will help you, and them, better understand important information designed to determine if you really can help them or not. We all have been in situations where we didn't ask some of these questions, went far down the path of our engagement process, and then got blind sided when the deal fell through or the client changed their tune.

All of these questions are designed to better understand the prospect's issues, current situation, compelling reason to change, and whether or not you are a good fit to help them at this time. The sooner you can do that, the less time you will waste on bad prospects or chasing bad deals, and the more time you will spend on good prospects and getting good business. Sounds simple. We all want that, right? And yet, there are questions you are not asking in your new client engagement process and with new projects from existing clients. Here are a few of the questions I find important to ask or get answered in some fashion that many business professionals forget about or get afraid to bring up.

"There are no easy answers... mostly just questions and conversations and creativity."

— David Whyte

Key Questions

- Why are we talking now? Why have you agreed to invite me in to talk?
- Why is this a good time to be talking? Is there any reason why now might not be a good time?
- What did you like about what you heard / read about us and the work we do?
- Related to... , what is currently working well?
- Related to... , what is currently not working as well as you would like?
- Related to... , what matters most to you?
- Is there anyone else who cares about this?
- Why change? Why not keep doing what you have been doing?
- What's the cost of this problem?
- Is there any urgency around the timing for making a decision?
- What are the steps, factors, and priorities guiding your decision making process?
- Are you talking to other companies about this as well?

“People do not like being skeptical – they want to like and be liked and believe the customer is that great person who is going to buy. They do not ask tough enough questions because they fear losing the opportunity. In the end, they come across as a sales person, regurgitating the marketing info that was taught to them instead of simply holding a conversation.”

— Jacqueline Rosales, Vice President of Business Development

I have a client I've been working with for a couple of years now. Each person on the business development / project development team has their own approach with new prospects and new opportunities with existing clients. That being said, there is a core list of things they know they must understand early on in the process that will help them and their clients more quickly decide if they should move forward or not. They are uncompromising with their focus on getting answers to these questions. They have sold the old way, and got tired of wasting time and energy on projects that went nowhere and on dead end prospects that talked a good game, but didn't come through. They are diligent, focused, and respectfully uncompromising with their key questions that must be answered within the first two calls / meetings related to a new piece of potential business. Here is a sample of their list. You will find similarities to my list above. The repetition is on purpose. What might yours look like?

Questions to Determine if There is a Next Step with a Prospect

from a Current Client

- Why are you considering a change?
- Why did you reach out to engage in a conversation with us?
- Business volume, project size, kinds of work done, etc.?
- Urgency around and timing for making a decision?
- Important factors in your decision making process for working with a new partner?
- What's the cost of this problem (or not getting it solved) to you?
- We have a bit of a different process than you might be used to for finding out if we are a going to be a good fit. Are you open to being flexible with your process?

- Who else in the organization cares about these issues?
- Pricing/budget/expectations?

“You have to be incredibly curious and want to know why and how, not just whether or not,” Rhein says. “Every answer they give you should lead you to another open-ended question: How did you do that? How did you respond to that? What else?” Find out what they really mean.

People tend to rely heavily on assumptions to communicate.”

— Barry Rhein, Fast Company Magazine August 2000,
Article by Cheryl Dahle

Sometimes when I am doing real-time deal coaching with clients, I will ask them, “If there were no rules, no boundaries, and you could ask anything you wanted and be radically direct and honest, what else might you want to ask?” This is a useful exercise to go through. The key is to be human, detached, unemotional, and authentically curious. Now, some of the things you write down that you’d like to ask, you can’t because your clients will get defensive or just not tell you the truth. Most of the questions you come up with in this exercise are exactly the right questions to ask. I am amazed at how often we don’t ask these key questions, with the highest intent, in a direct and thoughtful way.

Here are the answers a couple of my clients came up with when working through this exercise.

- “I’d like to ask a lot of them what holds them back from having a bigger plan and why they seem hesitant to break out of the ordinary. Why some of them show interest but just don’t buy.”
- “I am curious who else they do business with. What makes those consistent suppliers stand out or their product stand out. I’d like to ask them details about how their business operates that will help me get

them talking about specifics that I can actually apply to improve what we do for them.”

- “I want to know why they chose someone else on the last project we bid on with them. What those people had that we didn’t and why they didn’t choose us. We can learn from this.”

Consider that you actually can ask these things. I believe you are obligated to ask them. If you are not asking, there is a good chance you are wasting your prospect’s and your time. No one is going to yell at you for asking. If, for some reason, they do, then they probably aren’t a good prospective client, now are they?

“Most people don’t lie intentionally, but unless you really probe, you’re not asking them to go beyond the pat answers they have rehearsed. That means you’ll always get the positive data, but you’re not getting the full story.”

— Barry Rhein, Fast Company Magazine August 2000,
Article by Cheryl Dahle

Find a Prospect’s Compelling Reason to Change Before Presenting Solutions.

I have witnessed countless scenarios where people have presented specific solutions, prepared a complex proposal, and even negotiated financial details and talked about money before they asked, or received an answer, to the question of client’s compelling reason to change. Directly or indirectly asking about and uncovering things such as:

- “Why now?”
- “Why not wait?”
- “Why not just keep doing what you’re doing?”
- “Why us?”

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- “What’s the cost of that (issue to be solved / opportunity to capitalize on)?”
- “Why does this matter to YOU?”
- “What have you heard from us that is compelling enough for you to consider such a change / investment?”

When I ask new clients or workshop participants why a prospect is considering them for a project, they almost always say, “*We think it’s because...*” Then I ask if they have asked the prospect why they are considering them and what’s compelling about the idea of working with them based on what they have seen and heard to date. And they usually say no. Why don’t we ask this question? We don’t ask because we are afraid of rejection, afraid they won’t tell us what we want to hear, afraid they won’t have any answers at all, and afraid we might look stupid.

I have seen people in new business development waste five, ten, or even twenty hours working on fancy presentations and proposals that end up going nowhere because they didn’t ask some basic questions during the first few meetings. I understand that sometimes it’s important to give presentations and submit proposals without having every detail. That being said, there are fundamental questions that must be answered before we move deeper into our process. If the prospect can’t give you an authentic and compelling reason why they are considering you for a project or doing the project at all, then something is wrong. That’s the time to circle the wagons and have a different conversation, or decide to bow out gracefully and move on.

Your time is valuable. Respect yourself and your process. Your prospect’s time is valuable, too. Respect them enough to not want to waste their time. Find out their compelling

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Your time is valuable. Respect yourself and your process. Your prospect’s time is valuable, too. Respect them enough to not want to waste their time. Find out their compelling reasons to change before moving too far into the process and presenting final solutions.

Key Questions for Ending a Prospect Meeting

I’ve found it useful to clarify perceptions through a “Plus/Delta” assessment, a variation on the “Plus/Minus” measure, at the end of every meeting. The “Plus” involves asking about what worked, what the client and you like about what’s been discussed, etc. The “Delta” is to uncover what’s not working, what has not been addressed, what concerns or unknowns are still lingering, etc. Many people are uncomfortable with this

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There is a simple, two-part question most people in sales fail to ask at the end of each client meeting.

1. What Worked?

- "What was compelling, interesting, and relevant about our conversation?"
- "What is it about what you've heard so far that is compelling, interesting, and on target?"
- "What do you like about what you've heard?"
- "Reasons that it makes sense to consider moving to the next step?"
- "Reasons why it might make sense to consider working together?"

2. What didn't work?

- "What wasn't compelling, interesting or relevant?"
- "Anything you were hoping to hear that I didn't address?"
- "Reasons why it doesn't make sense to work together"
- "What lingering questions and concerns do you still have?"

There are many forms of these questions. What's most important is that you ask them consistently as part of your process. It is equally important that you are also answering the same questions yourself. Ideally you are doing this as a part of your conversation review with your prospect. If nothing else, you are at least running through your answers to these questions in your head or discussing them during your internal meetings about particular new prospects. Remember that this is a two-way street. You are both interviewing each other and deciding if you have a good fit. We often don't ask these questions because we're afraid of hearing what didn't work for them, what they are concerned about, and what they still aren't clear about or sold on. A part of us doesn't want to hear what we didn't do a good job of or what someone doesn't like. We're also afraid of silence, of them not telling us, not cooperating, or thinking it's odd or inappropriate for us to ask these questions.

If you are uncomfortable asking these questions, you can always frame them by sharing why you find it's important to ask them. Sometimes I say something like, "What I find is helpful at the end of these meetings is to do a quick plus/delta to do a review of where we are. If we can all share something about what we like so far about what we've heard and any lingering questions or concerns, we can then decide what we'd like to

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happen next. So, if you're open to it, I'd like to go around the table and I'll record everyone's responses. Then we can decide what, if anything, is next."

This is just one example. The point is, if you don't take control, your prospect will. As long as you have some rationale about what you're doing, why you're doing it, and that you believe is in everyone's best interest, it will work. I want to leave every meeting with as much information as possible shared in a meaningful way that builds goodwill and differentiates me from everyone else they might be talking to.

There is no way to have a chance of moving through your prospect's concerns and questions if we don't know what they are – ALL of them. When we facilitate a process to have them tell us what they like, what's relevant, etc., we also reinforce our value and relevance in their words, which is much more powerful than using our own descriptions.

Key Reminders:

- The more authentically curious you are, the more information you will get, the more problems you will have a chance to solve, and the more new business you will close.
- Controlling your adrenaline and staying detached from the outcome of your conversation will ensure you get the truth and maintain control.
- A framework of "What I know" and "What I don't know" will help set up your key questions and also put your prospect at ease. Get comfortable with communicating *What you don't know* from a position of strength.
- Find a way to incorporate a Plus/Delta review at the end of all important conversations and negotiations.

EGO

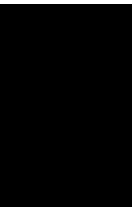
VALUE

LANGUAGE

FRAMING

CHANGE

TAKE AWAYS



LEARNING & CHANGE

Preview Points:

- Sustained change requires a disciplined effort over time and must tolerate feelings of discomfort.
- More information and knowledge has little correlation to your ability to change.
- Increased awareness and new daily actions give you the best chance for new results that stick.

“Research in neuroscience and cognitive science shows that people remember and respond most effectively to what they see and experience... On the other hand, experiences that don’t involve touching, seeing, or feeling actual results, such as being presented with an abstract sheet of numbers, are shown to be non-impactful and easily forgotten. Tipping point leadership builds upon this insight to inspire a fast change in mindset that is internally driven by people’s own accord. Instead of relying on numbers to tip the cognitive hurdle, they make people experience the need for change in two ways.”

— W. Chan Kim and Renee Mauborgne, *Blue Ocean Strategy*

Learning and Change

The drive to build sustainable, growth-oriented organizations is a part of the fabric of our modern business culture. In the U.S. in particular, the battle for highly skilled, sophisticated workforce talent is more heated than ever. The margin for error these days is small. The wrong hire or the lack of development by a key leader or sales professional can have dire consequences for the organization, both short and long term. I have seen entire organizations implode because their leadership did not have the skills and mindset to deal with crises or a

much-needed change in thinking and strategy. I’ve seen a lack of awareness of personal and interpersonal psychology derail leaders and sales professionals. Developing a more sophisticated level of awareness and skills in the areas of personal psychology, interpersonal communication, and business process and strategy is vital for success.

As a business leader, you cannot just look at the surface issues. You must have the courage to look at what’s beneath the surface. This is sometimes painful and even potentially embarrassing. Any unwillingness to having these conversations with yourself and your team is holding you back. Be willing to get radically honest with yourself and those around you about what really is working in your efforts to grow your business. Most importantly, be willing to have an honest conversation about what’s NOT working, without blame, fear, or judgment (easier said than done). Are you willing to dig into why certain efforts or results are not working, what needs to shift, and how you might be contributing to the problem?

Make More Calls

What is the underlying cause of the lack of results? Is it that you aren’t making enough calls or you’re not closing enough of the deals in your pipeline? That is the symptom, but the underlying cause is related to your thinking, your language in your approach,

and your process. A thoughtful and comprehensive approach to digging deeper is needed to understand what is not working and to create a plan to fix it. This is not as simple as “make more calls.” If that approach works, it will only be for a week, or month, or maybe more, if you’re lucky, before things return

“Too often in business we get caught in the trap of equating activity with productivity. The correlations between the two are not nearly as tight as we like to think.”

to their old state. We have to work on the underlying causes, not just the symptoms, to produce real change. And we have to be more sophisticated about our questions and our exploration of what's not working. The filters to run this through that I've found most beneficial are ones you've heard a lot about in this book. Again, the three filters are: **Thinking, Language and Process.**

If you want to make quantum leaps and fundamental shifts, you have to look deeper, down into the root causes in a way that explores both the psychology and strategy of business to business sales and personal achievement.

The ego also wants you to be perfect and has little tolerance for mistakes. This is the destructive force to learning and growth. To learn to practice what I am suggesting consistently, you must develop a high tolerance for making mistakes. What happens here is that you become hyper-aware of what is and is not working (your Thinking, Language, and Process). As you realize how many things you're doing are NOT working this can paralyze you, if your ego gets a hold of you. The ego has little capacity for self-compassion and the necessary patience it takes to integrate this new framework of thinking and doing business. It takes most people at least a year to fully implement it, and even then they need reinforcements to ensure it "sticks."

The ego wants quick results. The ego does not want to feel the pain of struggling as you build yourself back up again. The ego will even try to convince you that you already know and practice all the things in this book, even when that's not the case. You will be tempted to believe it. This is much easier than doing the hard work necessary to grow to new levels of awareness and discipline in your thinking, your language, and your process for engaging with clients. As much as increasing your level of competence and ability to sell yourself and

your company from a position of strength, this approach is also about being human and transparent. I want you to stand out in a truly unique way so your clients realize they can't get YOU anywhere else. When you reach this point, you have no competition.

In order to get to this place, you do have to take more risks, make some mistakes, and be more vulnerable. When I use this word I don't mean it from a place of weakness or meekness or crying or hugging. You can come from a position of authenticity and strength and still be vulnerable. Most of us are deathly afraid of rejection. The more you can almost dare them to reject you and be totally ok with it, the more business you will attract. New prospects will be drawn to you, trust you, and believe you can help them. Strength, wisdom, success, authenticity, and vulnerability don't have to be mutually exclusive.

Shifting Self-perception

Besides the philosophies and approaches in this book, one theme that I have tried to convey is the importance of creating a shift in the perception you have of yourself. Sales and any kind of business development activities provide a unique opportunity to see yourself, face your fears, and try new ways of interacting with the world. The bonus is that as you get better at these things, you make more money and help more people. As you are doing your own self-guided learning, or leading a team through new learning activities, use the filters of single, double, and triple-loop learning. Dig beneath the surface of the symptoms and work on the thinking and fears behind actions. Set up a culture that supports and challenges you and your team to execute new behaviors and get different results. Look deeper than just the surface symptoms and quick fixes. Is your approach really getting to the heart of the matter

and does it have a chance to create some level of sustainable change? Or is it just going through the motions, checking off boxes, and having everyone robotically do what they are supposed to do without true engagement or legitimately duplicatable results?

Making the Theoretical Real

One of the simplest yet most transformative elements of optimal learning I've seen is taking classroom learning and applying into real world experience. If there are new ideas and approaches that you've learned, the best way to find out if they work, change your habits, and make them effective is to apply, apply, and apply again to your daily life. Ideally, you will have a coach, mentor, or peer learner with whom you can pre-brief and de-brief about your experiences.

“Difference between belief and KNOWLEDGE — importance of experience (experiential learning — making abstractions/philosophy REAL), which leads to wisdom. I have knowledge when I have experienced that thing personally, and if I, for instance, walked on water, I would have knowledge that it is possible to do, and I could never again doubt it really. But if I only believe it on the word of somebody else, well, then it's only a philosophy, an abstraction, and a great necessity in evolution is to change belief into knowledge or into experience or into wisdom. To convert knowledge into wisdom that is experienced is that great journey of our spiritual development.”

—William Arntz, Betsy Chasse, Mark Vicente,
What the BLEEP Do We Know!?

Get Off the Bandwagon—Stop Searching for the Next “Big Thing”

One of the points I touched upon in the early parts of the book is how we look outside of ourselves for answers. Now, I believe strongly that it is a good idea to get outside support when you need it. But, there are so many organizational

leaders who are just looking for the next magical answer to their problems. Every few years there is a new fad to create a more effective organization, be more successful, be more productive, etc. Within all of these fads there are some good ideas. More often than not, though, they don't get executed well in the field and are not sustainable. This happens so often that I see most business professionals have become jaded against any NEW idea. They are skeptical that this is just going to be just the same thing — get excited, start something, and then go back to our old ways.

There is no quick fix and everyone knows that. If business leaders and sales professionals would focus on the basics that we are talking about in this book, they will be happy, more effective and successfully, sustainably grow their business. Sustainable success does not come that quickly and must be stuck with, done repetitively over time. Most people want something quicker and easier and especially don't want to have

“Quantum leaps in your results happen when you attach your day to day focus to a larger, transformational goal.”

to change themselves (I see lots of leaders that want their people to change but don't want to model the change, admit they don't have all the answers and try to improve themselves).

This excerpt from a Wall Street Journal article, “Executives Must Stop Jumping Fad to Fad and Learn to Manage,” by Carol Hymowitz (May 15th, 2006) talks about company leaders following the next movement or idea in management, leadership, or business effectiveness. People jump from one to the other to the other so often that it has become problematic and distracting rather than helpful.

“Consultants make their living trying to convince executives to buy the latest idea in management. These days, there aren't any hot, new trends, just

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a lot of repackaged ones from the past. Executives have been treated to an overdose of management guides that mostly haven't delivered what they promised. Many bosses have adopted them all, regardless of their company's business model, balance sheet, competition, employee bench strength or any other unique qualities. They have become copycat managers, trying to find a one-stop, fix-it-all answer to their various problems. Some ideas, of course, will never go out of style. W. Edward Deming's advice to companies to "drive out fear" so managers can act on what they know, admit what they don't know and change decisions that aren't working, is just one example of an idea as relevant today as when first proposed nearly a quarter of a century ago. But even in this case, a 1990s reinvention of Mr. Deming's total-quality movement in manufacturing, called Six Sigma, improved efficiency at scores of plants, but couldn't help companies meet another great need — more innovation.

Executives need to be more skeptical about anything billed as the next big idea. The smartest will learn how to cherry pick what is right for their businesses, rather than follow what they heard about from their golf buddies the previous weekend. Consultants hired by these former employers conducted employee surveys that always produced the same results. Employees would say they wanted more communication. In response, his bosses would say, "Let's put out a newsletter" — missing the message that they wanted to be heard, he says.

An operations manager at a Silicon Valley technology company complains that consultants hired by his bosses produce stunning charts but bungle answers to his production problems. "They tell my superiors we should produce parts only on demand — 1,000 on Monday and 5,000 on Thursday — capacity our suppliers can't handle," he says. Instead of offering complicated analyses, he wishes they'd spend time on the factory floor and understand how equipment really works."

The Oz Principle (excerpt below) also drives this point home. I like the image of pulling back the curtain on the illusion of power and all knowingness that we still sometimes think we have or need to have as leaders, or expect and look for in those that are leading us. We are destined to be disappointed. Recent examples of this in business, politics, and even in our churches show the magnitude of this problem. As our world gets more complex and confusing, we want more of our leaders and they are letting us down as never before.

Or maybe we're just exposing everything behind the curtain — and that's painful, especially when reality is not what we expected. The good news is that we are peeking behind the curtain, exposing our leaders, and also looking at ourselves in an unprecedented fashion in most areas of modern life. We have an opportunity to change what we see, and mostly by changing ourselves, our workplace, and our approach to business, leadership, and sales.

"When you pull back the curtains you discover the "truth" and realize, as did the characters in Oz, that corporate success springs from the willingness of an organization's people to embrace accountability. Too often, however, companies employ the latest management program only to abandon it when an even more up to the minute new program comes along.

...Moving from one illusion of what it takes to achieve organizational effectiveness to another, executives never stop long enough to discover the truth. In reality when you strip away all the trappings, gimmicks, tricks, techniques, methods and philosophies of the latest management "fads" you find them all, albeit awkwardly, striving to accomplish the same thing: to produce greater accountability for results... the essence of organizational success will always be found in the accountable actions and attitudes of individuals."

— Roger Connors, Tom Smith, Craig Hickman, The Oz Principle

Creating an Environment of Trust

In workplace learning environments and regular sales, staff, and leadership meetings, I find most people are afraid to talk about what's not working for them. Simple as it might sound, not enough leaders ask questions about what their teams are struggling with. Sometimes these questions get asked but get no response because people are uncomfortable being honest or it doesn't feel safe to tell the truth. Ideally this kind of truthful exchange can take place without an outside facilitator, although it can be useful to have one present. No matter who's running the meeting, or facilitating the training/learning session or discussion, there are three elements that need to be in place to get to heart of what people are struggling with: Trust, Structure, and Full Engagement.

Trust We all know the best lessons often come from mistakes and failures. And yet we hide our failures, are ashamed of them, and never open up about them in a group forum. For this process to work, there has to be a true sense of value in and credence given to the importance of learning from mistakes, missed opportunities, challenges as much as huge successes. People will only open up and allow themselves to be vulnerable if they trust the leader, if not the entire team. They don't want to be judged, punished, or seen as weak, stupid, or incompetent. If you can create a culture that celebrates and learns from mistakes, as well as successes, you will minimize the repetition of mistakes and increase the opportunities for learning and significant growth, both at an individual and organizational level.

Structure This is a lens from which to view and analyze your failures without it being personal. There has to be a context for mistakes, a framework that helps people make sense of

them, and measure their thoughts or actions against. Without a fundamental framework or structure into which everyone has bought into and has clear agreements and expectations around, chaos, lack of accountability, and personalizing mistakes and failures are destined to distract from the end goal. I see a lot of companies that have a "sales process" or "new client engagement process." Each of these has structure in that it has steps – what comes first, what comes next, what to ask, etc. Often times it does not have buy in from those on the front lines with daily opportunities to execute it. I see too many "processes" force-fed with little buy-in from anyone but the leaders who thought it was a good idea. Having a process and a framework to operate from is as much about following key fundamental principles, embodying the right spirit or intent, and having the necessary mental strength as it is about following a step by step map.

"There is often a willingness to leave untouched the most important issues in order to deal objectively with those that can be adequately quantified."

—Theodore Porter as quoted by Jerry Hirshberg
in *The Creative Priority*

Engagement How many times have you been a part of a meeting or a conference call where you were not fully engaged, just went through the motions, were distracted by random thoughts, or wasted time checking emails? In order to facilitate a discussion that is meaningful and productive, everyone has to be fully present and actively engaged. Easier said than done obviously. There are things you can do, though, to help make this happen. As a leader, I want you to become more aware of the following things. What is and is not working in your weekly management or staff meetings and periodic training sessions? When are people most engaged, or not engaged? Consider some of the

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topics in this book to mix things up and stimulate some new conversation and level of engagement. Just make sure not to shove any of this material down people's throats. If you do, it will befall the same fate as all your past efforts to integrate "the latest, greatest new system to grow our business!" into your company culture.

How to Change

It's not possible to just think yourself into change. You can't use the same brain that got you here to make a change in your life. You have to be able to observe yourself in order to gain a new and greater perspective. To change, we first must intend the change. Intention results from a conscious decision to change, of your own free will. Change is hard. Therefore, you have to want to change in order to have any success. And I mean really want it. You will find resistance from habitual thoughts in your mind and especially from your ego. The ego hates change, particularly change that minimizes its power and control over you. You will also find resistance from some people in the outside world, at work, and at home. Some will welcome your changes. Many will not. Be prepared for resistance from everywhere. This is another reason why most people need some form of outside support in order to move through these roadblocks and persevere.

Dr. Joe Dispenza says, "What separates us from all other species is the ratio of our *frontal lobe* to the rest of our brain." This is responsible for our decision making, regulating behavior, and creating clear intention. We have the capacity to make choices every day. Choices other animals may not be capable of, we can make in a matter of seconds. With this ability to make clear, conscious choices, and create intentions, also comes the burden of options and the potential to also make an exponential number of bad choices. A dog can make a bad

choice to chase a squirrel in front of a moving car, but it's not really even a choice because it is reacting on instinct. We make bad choices while often having full knowledge of the repercussions of our actions.

Our bad choices are often in the form of deciding NOT to do something:

- making a phone call
- going to the gym
- taking a taxi vs. getting in the car to drive home after a few too many drinks
- spending enough time with my best client
- thinking positively, trusting things are going to work out
- valuing myself
- treating others with respect
- being totally honest with a client or business partner

In order to make changes it's essential that the focus and desire to change and do things differently is sustained over time. One of the biggest obstacles to this is that the mind is wandering all over the place. For your new intention to work (i.e.: attract two new "A-caliber" clients before the end of the year) it has to be focused. Yet, at the same time, the culture we're living in is constantly grabbing for our attention. We are inundated daily with marketers' messages for us to pay attention to what's cool and what we must have to be happy. Not to mention our daily barrage of emails, voice mails, phone calls, text messages or IM's, conference calls, meetings, etc. More and more, people are vying for our time and our attention. Your clients are experiencing the same thing. It's hard to stay focused and not get distracted.

Pattern Interrupts

Much of what I am referring to is about being able to recognize and interrupt patterns; to move away from – or at least look differently at – the way you’ve always been doing things. In the specific cases I’m working through, it is related to your process of identifying and engaging more of the right kinds of new clients or growing business from your existing clients. The concept is relevant, of course, in any aspect of your life.

Exercise: Interrupting Our Patterns

(original author unknown)

Look briefly at the paragraph below and count the number of F’s you see. Write the number down on a piece of paper.

FINISHED FILES ARE THE RE-
SULT OF YEARS OF SCIENTIF-
IC STUDY COMBINED WITH THE
EXPERIENCE OF MANY YEARS

Now, look at the paragraph below. It is identical to the one you just viewed. Again, count the F’s. Did you find more of them, less of them, or the same amount? If the number is different this time, write down the number on a piece of paper. If you don’t want to cheat and see the answer in advance, don’t look below the paragraph. *Answer:* See page 100.

FINISHED FILES ARE THE RE-
SULT OF YEARS OF SCIENTIF-
IC STUDY COMBINED WITH THE
EXPERIENCE OF MANY YEARS

After doing this with groups for a few years, I have found that about ten percent of the time someone sees all six of them

on the first try. Thirty percent of the time, someone sees all six of them on the second try. But that leaves a lot of smart, successful, well-educated people that can’t count or see the letter F in the above paragraph. How does this happen?

People who don’t see all the F’s miss the ones in the word “OF.” We just skip over it, at least the first time. Our brain is scanning quickly and doesn’t even pick those up. For me, achieving new levels of success and results in sales, business, leadership, and life, is about picking up on some of these little details that I’ve been missing and about looking at things in a different way.

You can notice that at some point, if you keep looking at those paragraphs, you’re not getting new results, you’re just getting the same repeat loop – like looking in the refrigerator over-and-over and seeing the same thing. You know there is a jar of pickles in there somewhere, but you just can’t see it. When we see the same things and think the same thoughts over-and-over, we cement the connections in our brain and build a rut that is hard to get out of.

I know it sounds simple, but I find that you must create new thinking in order to get new, repeatable results. A new way of looking at something, a new perspective, a new approach. William James, often referred to as the father of modern psychology spoke to this quite concisely when he said,

*“Genius means little more than the faculty
of perceiving in an unhabitual way.”*

—Wayne Dyer, *The Power of Intention*

Neuroplasticity is the word used to describe the brain’s ability to make new connections and change. It’s hard to do, but definitely not impossible. I have people that tell me “people can’t change.” I understand this perspective at a certain level

but fundamentally disagree. It's hard for people to change and they have to want to change. There are core, foundational elements of people's personalities and mental programming that are deeply hard wired, yes. So, maybe you can't entirely change who someone is, I agree. But people can create shifts in behaviors, results, and thinking. They just have to be committed, have the right kind of system to support and challenge them, and then continually reinforce the changes to make them stick. I have seen, and do see, people make fundamental shifts in how they act, talk, and think every day. And I'm sure they are not the norm.

“People must be encouraged not only to know their craft, their products, their work and the people they serve, but to know a little of themselves. In order to respond to the world of wants, they must know of what they want themselves. Just as important they must know what they do not want. They must look at their inherited fears around conversation, particularly the conversation about their own gifts. The personal conversation can be very frightening, but it is an increasingly necessary one, especially for those who have any leadership role in the organization.”

—David Whyte, *Crossing the Unknown Sea:
Work as a Pilgrimage of Identity*

Slow is Fast - in Sales and Learning

“When educating horses, there is no greater maxim than slow is fast and fast is slow. I believe that the groundwork put into developing trust is always worth it, because once trust is established the learning process speeds up noticeably. I call this phenomenon “slow is fast.”

—Monte Roberts, *Horse Sense for People*

In sales, if we move too quickly down the line of our process, we often miss essential questions, relevant pieces of information and important cues from the prospect. Sometimes the hardest thing to do is to slow down a prospect who is excited

about the idea of working with us. That's when it is the easiest to skip steps in our process and forget to ask key questions. And, sometimes we're working with a difficult prospect who is not giving us all we want or is resisting some questions or next steps, and we get nervous they are going to get mad at us or go away, so we decide to compromise (consciously or unconsciously) and skip some steps or key questions they might not like. There is a natural tendency in sales and business communication for most people to rush things, especially if they are excited and also if they are needy of making something happen. If we move too quickly without the foundation having yet to be laid, we are doing ourselves and the prospect a disservice. The key foundational questions and steps might be different for each person or company, and everyone has them. And they know when they've skipped them and what the consequences are most likely to be. I've done this myself, skipping an entire conversation and moving too quickly to talking about \$/price and having a prospect talk to my references. I thought it was a slam dunk. But there were questions that I had not asked yet and data about their challenges and the economics of those challenges and a real compelling reason to change and do something different now. And the prospect got caught up on the money. Basically comparing the cost of my service (i.e.: \$20,000) to \$0 which is what he was currently paying for the kind of services I was offering. He decided it was too steep a price to pay. My point is that we all move too quickly at times, especially at the beginning of a relationship.

In the context of sales and negotiation, adrenaline is not your friend. Recently, a client sent me this note after he had a realization how the emotion he thought was helping him and just a part of the process of sales, was actually keeping him from closing business. He saw how he was getting too attached – wanting the deal more than the prospective clients wanted

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help or change. And how even when things were going well, if he got too excited about things, his prospects would start backing off, or would later change their mind. This might seem counter-intuitive to what you've been taught or learned in sales. You might not even agree. I happen to believe this statement is quite prescient and right on the money.

“Intense emotion in a sales situation, no matter how well-intentioned seems to more often than not have an undesired outcome, and leaves you feeling drained as well.”

— Brian Frampton, Sales Professional

Key Reminders:

- Get off the bandwagon. The next “big thing” business initiative or quick fix is not going to get to the heart of the matter to create real change.
- You have to want to change. You have to want to do something different; to be motivated and courageous about trying new things, and making mistakes.
- Slow is fast in learning (and in your sales process). If things are moving too fast, you will lose control of your ability to retain information and make sustained changes over time. The same goes for your new client engagement process. If things are moving too fast (even if that seems like a good thing), slow it down.

EGO

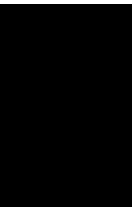
VALUE

LANGUAGE

FRAMING

CHANGE

TAKE AWAYS



CONCLUSION

This book will be most useful if you take its contents to heart and weave it into your daily routine over time. I trust you will be able to take some of the key points and generate tangible results for yourself and your team. Below are a few key reminders I'd like to leave you with.

Authenticity Sells

Today, more than ever, people are looking for more genuine and authentic brands to purchase, and thoughtful, honest, and effective new business partnerships to forge. Everyone is very busy. People are overwhelmed and are tired of b.s. They want business relationships they can trust, that add value, that can be measured at the bottom line, and that are also interesting, challenging, and rewarding at a personal and professional level. People are responding to a more human, authentic approach.

“Integrity – Authenticity comes to a brand that is what it says it is. In other words, the story that the brand tells through its actions aligns with the story it tells through its communications. Only then will customers sense that the brand’s story is true.”

—Bill Breen, Fast Company Magazine, May 2007,
The Appeal and Risks of Authenticity

What We Call “Selling” Isn’t Really Selling Any More

Your job is to engage people in conversations and help them figure out what they need and if you can help them. We

often make “sales” or “business development” out to be this big THING. When we make it a THING, it keeps us from making that call, asking for that referral, having that lunch, or calling that lead. This mindset leads to avoidance and the most dangerous thing for any business – lack of consistent, growth-related activity. There are ways to make new business development more comfortable, human, and not so much of a THING. It can be comfortable, easy, and even kind of fun with the right approach. You can show the client that you are the expert without having to feel like you are “selling.”

The better you understand your unique value – what you do naturally well that your clients most value – and the more effectively you communicate it, the more people you will help and the more you will get paid.

You have the opportunity to control the client engagement process. He who has the most effective and disciplined process, wins. Your process for engaging prospects is an opportunity to differentiate yourself from the competition.

The more quickly you weed out and let go of bad prospects, the quicker you can find new and better ones. This takes a focused effort to find more new prospects, while simultaneously spending less time on drawn out, lingering deals with people that are not really ready to do business with you.

“No” is perfectly ok. The one thing traditional selling NEVER does is to make “no” perfectly ok. The truth is, the answer is often no: “No, we’re not open to talk right now,” “No, we’re not interested in what you do,” etc. If we make no an ok answer at every stage in our process, while also doing a better job with how we communicate our unique value, we create the space for them to say yes when that might not be their normal, first response. This is the paradox of it all – we have to make no ok in order to give ourselves a better chance of getting a yes. And if the answer is really no, then I want to

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know that too. The first job in trying to generate new business from new prospects and existing clients is to get a response. And the second is to get the truth.

No begging. What most would argue is just being polite, actually puts anyone working on getting new business in a one-down position, beneath their client. I ask all my clients to delete the word “please” from all the prospecting and business development communication. This is a weak word. Same goes for “Thanks for your time.” Most people have a hard time with both of these. The problem is you’re setting up the dynamic that their time is MORE valuable than yours - which is not true. You have unique value and possible solutions to their problems. You can save them time and make them more money, not to mention make their life easier and more productive. Your time and energy is of equal value to your prospect and client’s. Act, and talk, like it.

No assumptions. It may seem radical, but, in my opinion, you should not assume that you can help everyone. You’re really seeing if a prospect is OPEN to your help. You think you can help them, but until you have an idea of what they are struggling with, looking to achieve, and open to - and then seeing if those things are in alignment with what you do and how you do it - you can’t be sure. Any words or phrases that are used before you really know a prospect that give the impression that you are assuming you can help (i.e.: “I am excited about the ways we can help you.”) or assuming that they will call you back (i.e.: “I look forward to hearing back from you.”), minimizes your chances of advancing your process and creating the space for an open dialogue.

“I don’t know,” is perfectly fine, and can actually be a strong statement. In sales and negotiation “I don’t know” is a dirty word that almost no one uses. If it’s true, and is delivered in the right way and context, it can actually put you in a

position of strength and increases your chances of getting the truth. Out of context, this can sound a bit crazy, I’m sure. Again, all this is designed to help get the truth, ensure the sales process progresses, and stay in control. In every situation, there are things you KNOW (data - irrefutable fact) and things you DON’T KNOW (but might be interested to find out). If you think it, say it. Be refreshingly honest and you will stand out from the crowd and waste less time with people that are not a good fit for you or your organization.

Mindset of abundance vs. scarcity. You have an abundant marketplace of opportunity. There are plenty of people that are in need of your product or service. If you think anything other than this on a daily basis, you are costing yourself a lot of money. Your mindset sets up your ability to attract more of the right kinds of clients. Pay attention to your thoughts to see if they are running through an abundance or scarcity filter.

Shift in Self-Perception

Besides the strategies and tactics in this book, one theme that I have tried to convey is the importance of creating a shift in the perception you have of yourself. New business development related activities provide a unique opportunity to see yourself differently; to face your fears and try new ways of interacting with clients. The bonus here is that as you get better at these things, you will see more financial success, solve more problems, and help more people. The goal for this book has been to plant some seeds in your head and give you a few tools for how you might interrupt some old, habitual patterns and see yourself and your business in a whole new way.

RECOMMENDED READING

Below are a few books that have recently influenced me, my writing, and teaching. This is not a comprehensive list, but gives you a couple of “out-of-the-sales-box” ideas for business and personal growth. I find that NOT reading sales books is what has helped me make quantum leaps in my both sales results and those of my clients. If you are a thoughtful, growth-oriented professional, I encourage you to branch out in what you read. Make new, relevant connections to other creative ideas and perspectives that might help you be more effective in your approach to growing your business and yourself.

- Marcus Buckingham, *The One Thing You Need to Know... About Great Management, Great Leadership & Sustained Individual Success.*
- Malcolm Gladwell, *Blink*
- Eckhart Tolle, *The Power of Now + A New Earth*
- Susan Scott, *Fierce Conversations*
- Bill Caskey, *Same Game, New Rules*
- Wayne Dyer, *The Power of Intention*
- Thomas Friedman, *The World is Flat*
- Monty Roberts, *Horse Sense for People*
- David Hawkins, *Power vs. Force*
- David Whyte, *The Heart Aroused, + Crossing the Unknown Sea: Work as a Pilgrimage of Identity*
- Patrick Lencioni, *The Five Dysfunctions of a Team*

- Victor Frankl, *Man's Search for Meaning*
- Napoleon Hill, *Think and Grow Rich*
- Stuart Wilde, *The Little Money Bible + Silent Power*
- William Arntz, Betsy Chasse, Mark Vicente, *What the BLEEP Do We Know!?*
- Jerry Hirshberg, *The Creative Priority*
- Jeff Salz, *The Way of Adventure*
- Michael Lewis, *Moneyball*
- Fast Company Magazine

Qualities of Top Performers

in Sales & Professional Services

Open to learning

A student of learning. No matter how successful, always open to new ideas and ways to improve. Open to direct and honest feedback.

Master of their process

Has a complete process and executes it daily. Has process for engaging new clients, getting referrals from existing clients, system for administrative support and paperwork, process for scheduling and life balance. The more systemized, the more sustainably successfully without burnout.

Motivated by more than money

Some level of passion for what they do. Eager to take on the challenge of building something, being the best and providing more value to more clients.

Work seems effortless

Perhaps it is not always effortless, but a feeling like you're doing something that you're good at. "This is what I do." Where you feel very well compensated for the value you bring and it comes naturally to you.

Sees the marketplace as abundant

Even in hard times, has the ability to see the opportunities in the marketplace. Is resilient and optimistic without being naive. Believes in self and trusts process will deliver results in any business climate.

Has prospects convincing them that they are prospects Doesn't "push", but "pulls." Set's the stage with clarity and conviction, but is respectfully detached from the individual outcomes and lets the prospect do the work.

Is not afraid to ask the tough questions

Fearless without arrogance, is able to ask difficult questions, risk being judged, and making people uncomfortable. Able to do this and still keep the people psychologically "OK" enough to stay engaged, challenge assumptions, and open to change.

Quickly creates an environment of safety and trust

Frames the sales process and meeting clearly and quickly to keep client feeling safe and ok to open up.

Understands their value and connects it to client's pain

Frames their value in real world terms that are specific and relevant to the client and their current pain or potential opportunities. Does so at a gut level without using buzzwords.

Curious, looks to solve problems, and unattached to outcomes

Has a natural curiosity, asks great questions, interested in solving problems, and is not attached to specific outcomes of individual meetings.

Fearlessly resilient

Undeterred by adversity. Stays the course with focus and passion.

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Clear and passionate about what they do and why they do it

Tells a compelling and personal story about who they are and why they believe in what they do, why they do it, and who they do it for. Shows passion and conviction without too much excitement. Compels people to want to follow them and be a part of what they have going on.

Does not take “No” personally

Learns to check ego’s needs at the door and be ok with “No.” Does not feel the need to push people to outcomes they are not ready for. Is OK challenging people, but knows the line between challenging, asking, and then convincing and persuading. Understands that “No” is not a personal attack.

Has a high regard for their own personal value

With a healthy balance, has a deep understanding and belief in the value of who they are (as a human) and the skills and gifts they bring to the table as a professional. Believes in themselves and what they do in a grounded and confident way.

Qualities of Top Performers

in Sales Leadership

Vision

Define the future in vivid terms, through their actions, words, images. Leave no doubt where they and their team are headed.

Clear expectations

Ensuring their team understands what is expected of them, individually and collectively. Using consistent check-ins to eliminate ambiguity and minimize potential swings in performance and focus.

Self-efficacy

How quickly they bounce back from failure or set backs. Perseverance.

Balanced emotional attachment

Caring is important, with employees, internal organizational challenges and high stakes sales situations. However, caring TOO much, or more than others, is a recipe for unnecessary stress.

Coaching instinct

Being genuinely intrigued by their people and their unique talents and the challenge of figuring out how to arrange things so that they can experience the greatest success possible. Having passion for “Helping other people grow.”

Trust

Their people trust them and believe they have their best interest at heart. Their words and actions are congruent with each other.

Self aware

Have worked to better understand their compulsive habits, patterns, and mindsets that can hold them back. Able to “own” certain behaviors and not make everyone else the problem. Able and willing to take a hard look in the mirror, especially in difficult or charged situations.

Open to experiment

Not afraid of taking chances and risking failure. Passion for trying new things. High “courage quotient.” Curious and inquisitive, always on the lookout for the small insight or new perspective that gives them an edge in the marketplace.

Driven

Passion for building something. Desire to succeed and make money. Able to celebrate victories and acknowledge progress, while at the same time never quite being satisfied. The *rub* between the *what is* and the *what could be* motivates them.

Genuine

Having a natural, genuine nature is essential to inspiring others sustainably. Being transparent, honest, clear, real, and authentically HUMAN.

Curious

Excellent at asking questions and active listening. Natural curiosity that cannot be faked. Seeks to understand problems and people before jumping to conclusions.

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Sales abilities

Still open to get “in the trenches.” Not above selling, making calls, etc. Modeling key mindsets and behaviors for your team. Progressive thinker and communicator, staying up to date on new ideas and approaches to sales communication. Comfort with email, phone, and face-to-face communication with clients.

Process oriented

Ability to execute key processes on a consistent basis. Disciplined ability to stay focused and follow through with weekly meetings, team one-on-ones, reporting, tracking, etc.

Ability to rally people to a better future

Carrying a vivid image of what the future could be. Ability to clearly and effectively communicate their own image of the future and get people to buy into that image.

Optimistic

A sincere, deep belief that things can get better. This does not mean being unrealistic, nor does it mean always being positive and full of sunshine. It does mean that nothing can undermine their faith that things will improve.

Approachable

Pleasant demeanor. Approachable and fair-minded. Not necessary to be everyone’s friend, but important to earn their respect and have an overall positive disposition.

Open to feedback

Interested in seeking feedback from employees, peers, and boss or board. This may be in a formal, structured process or done more informally. The key being open to and interested in feedback.

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If you would like information about in-house corporate training and consulting programs, high-level private coaching, public workshops, or speaking engagements, you can visit www.perficency.com or contact Ray Green at 760-402-6285, ray.green@perficency.com. If you have questions or comments for me, I can be reached directly at tom@perficency.com.

Barking Up a Dead Horse

Avoiding the Wasted Time and Effort
in Business-to-Business Sales

Tom Batchelder



A DIFFERENT APPROACH TO SALES AND PERSONAL ACHIEVEMENT

Available Fall 2007

“Since being introduced to these principles, my sales on average are up about 35% and my funnel of qualified prospects has more than doubled. I have learned to define and communicate the value that I and my company bring to the marketplace and I now have a focused process to prospect, qualify and earn long-time clients. This process is more conversational, more open and honest and definitely more effective.

The resulting sales are larger, margins are higher, and the sales cycle shorter.”

— Scott Whitney, Sales Representative

“This approach gave us a different way to think about sales, a new language that is much more human, and a systematic process that allows us to be in control with prospects and clients.”

— Roseanne Luth, Business Owner



“Barking Up a Dead Horse” aims to:

Challenge mental assumptions and build a radically honest, yet common language for engaging new prospects and existing clients. The end result being...

- Finding more of the right prospects & making them clients faster.
- Creating a fundamental, radical shift in the traditional buyer-seller dynamic.
- Increasing retention & maximizing the human potential of your people.



Tom Batchelder specializes in coaching progressive business leaders in the areas of sales excellence and life success. He has over 17 years experience in sales, management, entrepreneurship, and coaching. Working with Fortune 500® organizations and emerging small businesses, Tom helps clients control their sales process, shorten selling cycles and effectively increase profit margins.

Tom received a B.A. in Communications from Indiana University and has completed extensive graduate level studies in Counseling Psychology at the California Institute of Integral Studies in San Francisco. He lives with his wife Lisa and son Nicholas in Indianapolis, Indiana.