

paperlessPARTS 

**SysAid**®



# Sales Method Workbook

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# Upon completion,

The goal is to help you:

1. Shorten your cycles.
2. Build more pipeline.
3. Facilitate instead of convince.
4. Create value from the outset.
5. Secure commitment at every sales process stage.
6. Earn respect and foster trust.
7. Increase your average deal size.
8. Evolve and learn as a team.

Any goals of your own?

# Fast Forward the Clock

What do you want your prospects and customers to say about you one year from now?

**NOTES:**

# The End Goal

## A Fully-Aligned Meeting Recap

### Email Part #1

*I really enjoyed our chat this afternoon and the opportunity to learn more about the [Company Name] story. Below is a short summary of what we discussed and agreed on.*

*Your needs are as follows:*

- Recap challenge(s)

*Assuming you develop the conviction that SysAid is going to help and be the solution of choice here are two options:*

**OPTION 1** [Package Details]

**OPTION 2** [Package Details]

*The investment will be approximately [Price Quote] for the first year. This amount represents a bit more than what you we expecting,, but you indicated that you would be comfortable provided that [Stated Reason].*

# The End Goal

## A Fully-Aligned Meeting Recap

### Email Part #2

*You told me that you would like to have a solution in place no later than [Live Date], for the following reasons [Reason 1 & 2]. To achieve that we agreed that the implementation would have to begin no later than [Imp. Date], which means you would like to have a final decision made no later than [Decision Date].*

*To make that happen the following member of your team need to be on board: [Decision Makers]*

*Our plan to make sure that you and [Name] have everything you need come to decision no later than [Decision Date]*

### **LAYOUT THE STEPS OF THE MUTUAL PROJECT PLAN**

*Please review the above, and let me know if this is accurate and matches your understanding of what we discussed.*

# Determining Factor

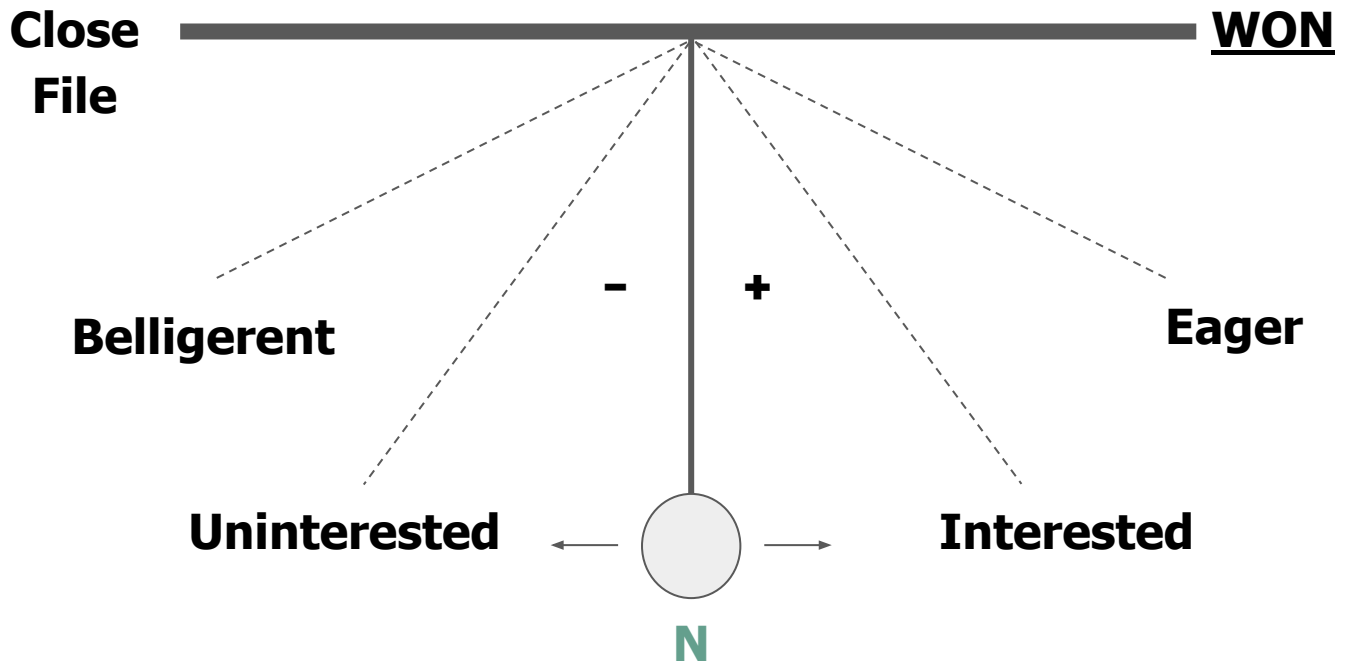
How do they “feel” about you

**Body  
Language  
54%**

**Tone  
39%**

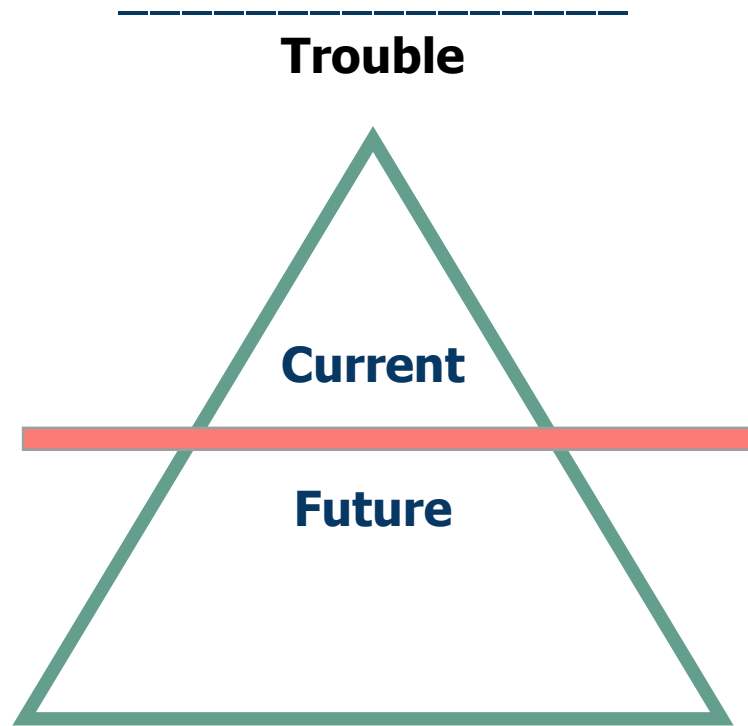
**Words  
7%**

# Keep Left



NOTES:

# What Drives Human Behavior?



**See it coming**

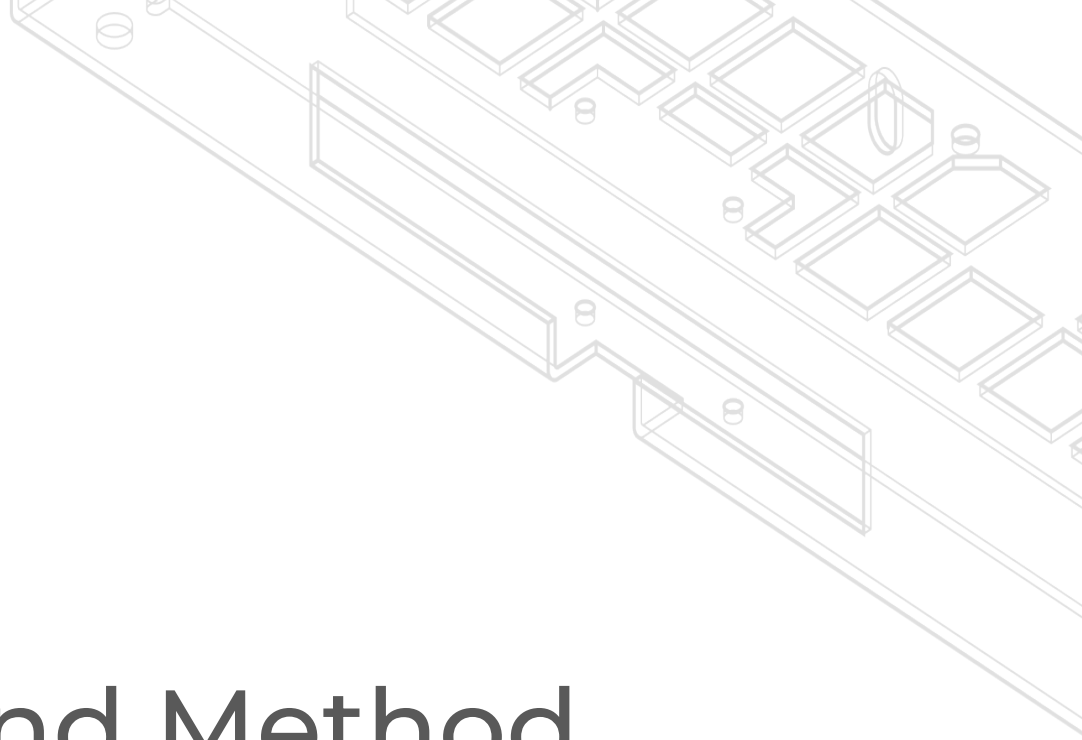
**Visualize something great**



# Client Knowledge Toolkit

ICP:

| <b>Challenge</b><br>"I'm sick and tired of ..." | <b>Evidence</b><br>How is it showing up | <b>Other approaches.</b><br>Attempts to address the issue | <b>Economic Impact</b><br>How is it measured | <b>Solution</b><br>"What I really need is..." |
|---|---|---|--|---|
|   |   |   |  |   |
|   |   |   |  |   |
|   |   |   |  |   |



# Outbound Method

# Outbound Rubric

| DID YOU?                       | Yes | No |
|--------------------------------|-----|----|
| Interruption breaker?          |     |    |
| Disarmingly honest?            |     |    |
| Set the stage (Mutual Agenda)? |     |    |
| Role Specific pain?            |     |    |
| Ask the 5 questions?           |     |    |
| Clear future or no?            |     |    |

**Interruption breaker:** Hi, Andrea (pause) This is (YOUR NAME)...Did I get you at a bad time?\*

**Disarmingly Honest:** Like I said, my name is (FULL NAME) and I'm with SysAid. I'm sure you've probably figured this out by now, but this is a sales call. Are you sure you don't want to hang up?

**Set the stage:** I appreciate that, Andrea. Honestly I don't know if we have anything for you, but with your permission, I'd like to take the next 3 minutes to give you the top reasons an IT Director like yourself could be interested in carving out some more time to chat. If none of these make sense i'll just get out of your hair. Can I get that 3 minutes?

# Role Specific Pain

So it might not be the case with you but often when I speak to other (INSERT TITLE) they discover we can help them out in one of three ways.

**INSERT PAIN MENU**

## **Stay left and pause:**

But I caught you out of the blue, and I don't want to assume you feel the same way?

Sound familiar or not so much?

I don't suppose this is a concern for you?

# 5 Questions

You know, I just called in out of the blue, and I realize this might be a sensitive area, so you might not want to go too far.

**ONE:** Is there more you could tell me about that?

**TWO:** Are there any other specifics you think I should be aware of?

**THREE:** Is there an example you're comfortable sharing?

**FOUR:** Have you tried anything else?

**FIVE:** Of all the things on your plate, I can't imagine this is a high priority...is it?

**NOTES:**

# Next Steps or No

So look, we are at the 3 min mark here. Based on what you shared, it sounds like there may be an area where we offer a solution, although...neither of us can be sure if it's a fit yet.

It's your call. Should we find some more time to explore this further? Or should we just pull the plug?

## If you get a YES

I'm looking forward to continuing this conversation. Are you sure it's worth setting aside another hour to explore this further, or did I get a little pushy?

## NOTES:

# Setting the stage with a Mutual Agenda



# Mutual Agenda

| DID YOU?  | Yes | No |
|---|-----|----|
| Conduct any pre-work?   |     |    |
| Understand the general purpose of the call before you started?        |     |    |
| Spend time to build rapport as opposed to just jumping into the call? |     |    |
| <b>UFA</b>  |     |    |
| Confirm Time  |     |    |
| Round of intros / what peaked the interest                            |     |    |
| Buyer's Goals for the call  |     |    |
| Establish right to ask questions first                                |     |    |
| Mutual plan for the meeting   |     |    |
| Saying "NO" is OK at anytime.   |     |    |
| Save last 5 min to discuss next steps                                 |     |    |

# Sheet Music

## **Confirm Time:**

"Hey [Name], thanks for taking time to meet with me today. Do we still have 60 minutes set aside for the meeting? Are you sure?"

## **Understand who's attending and why:**

"So this meeting came together pretty quickly. But I have done some pre work, and I'm really interested to know more about your role and what piqued your interest. Can you tell me?"

## **Buyer's Goal for the call:**

"Thank you. Of course I've got my objectives for the call, but let me ask you: for this to be a great use of your time what do we need to accomplish in the next hour? OK. And from your perspective, what's the most useful way to do that?"

## **Establish Right To Ask Questions and make clear intention:**

"Sounds good. I have got a list of questions that I'd like to ask to ensure that when we show you something it hits the mark. How does that sound?"

## **Mutual Plan for the meeting:**

"Great, so how about we spend the first few min for me to ask some questions and than I can discuss a few different ways to potentially help you out?"

## **Saying "No" is OK:**

"Now you have to do me a favour if you don't mind. If you for some reason you feel like this isn't a good fit, are you ok letting me know? Great. I've got thick skin so I can take it."

## **Last 5 minutes to discuss next steps:**

"Just one more favour I have to ask... can we just agree to take the last 5 in to talk about where we go from here?"



# Diagnostic Step

Thoroughly diagnose the pain or set of issues to uncover and address all three levels of discomfort.

# RUBRIC

| DID YOU?  | Yes | No |
|---|-----|----|
| Revisited stated pain or presented list of pain probes? |     |    |
| Stripline what we can't deliver on?                     |     |    |
| <b>L1</b>   |     |    |
| Tell me more?   |     |    |
| More specific?  |     |    |
| Recent Example?   |     |    |
| How long it's been a problem?                           |     |    |
| What did you try?                                       |     |    |
| How did it work?  |     |    |
| <b>L2</b>   |     |    |
| Business impact?  |     |    |
| No cost?  |     |    |
| <b>L3</b>   |     |    |
| Personal Priority?                                      |     |    |
| Why?  |     |    |

# Sheet Music

## **L1**

*Can you start by telling me more about that?*

*You mentioned X...can you be more specific?*

*Can you think of a recent example?*

*How long have you been thinking about this?*

*Have you tried anything in the past to solve for this?*

*Is the situation getting better, worse or staying the same?*

## **L2**

*How is this particular issue affecting the business?*

*Chances are it's probably difficult to quantify?*

*Is that a lot of money?*

## **L3**

*With everything you've got going on..how high of a personal priority is this?*

*Where does it rank?*

*What makes it so high? OR Should we continue when it becomes higher?*

# Gain Based Approach Sample Questions

## **Tell me more:**

*"Starting off, would you mind sharing a quick overview to what you are looking to accomplish with a new solution? This will put me in a better position to know if we have something for you."*

*"You said X...can you be a little more specific?"*

## **Recent Example:**

*"Well, since you don't have it....can you offer me an example of what the benefit would be if you did?"*

## **How long:**

*"How long have you been thinking about this?"*

*"What other things are you planning to do to make sure that you achieve your goals?"*

## **Business Impact:**

*"It might be tough to calculate but what would the business impact be if you had something like this?"*

*"And how would that help you financially?"*

## **Personal Priority:**

*"Of all the things you have going on, where is finding a solution like this rank on your list of stuff to do?"*

# Their/Our Solution

Assisting reps in providing a high-level conceptual overview of SysAid to instill hope in buyers.

# Their/Our Solution Rubric

| DID YOU?                               | Yes | No |
|--|-----|----|
| Set the stage?                         |     |    |
| Master recap?                          |     |    |
| Ask for their ideal solution?          |     |    |
| Stripline what we can't deliver on?    |     |    |
| Lead with their most important thing?  |     |    |
| Reverse & stay to the left throughout? |     |    |
| Got what they needed?                  |     |    |





# Talk about money

Now it's time to start defining what doing business together might look like.

# Money Rubric

| DID YOU?                              | Yes | No |
|---------------------------------------|-----|----|
| Permission to talk about it?          |     |    |
| Where it's coming from?               |     |    |
| Firm number on the table with belief? |     |    |
| Should we continue?                   |     |    |

NOTES:

# Decision Specifics

Grasping the decision-making processes.

Identifying key decision-makers.

Pull compelling event.

Recognizing potential red flags.

# Rubric

| DID YOU?  | Yes | No |
|---|-----|----|
| By <b>WHEN</b> do you want a solution in place? |     |    |
| Why that date is important?                     |     |    |
| Who else cares?                                 |     |    |
| Who ultimately signs off?                       |     |    |
| Out of the woodwork?                            |     |    |
| <b>HOW</b> in the past? Similar?de              |     |    |

# SysAid Rule

Our sales process is based on TWO ROLES in the account

ONE: Champion

TWO: Economic Buyer

Here is our internal agreement with one another (company wide)

Regardless of your role, be willing to say...

**“I don’t have a sponsor”**

**“We’re not at power”**

**“This person I’m speaking with isn’t the right person”**

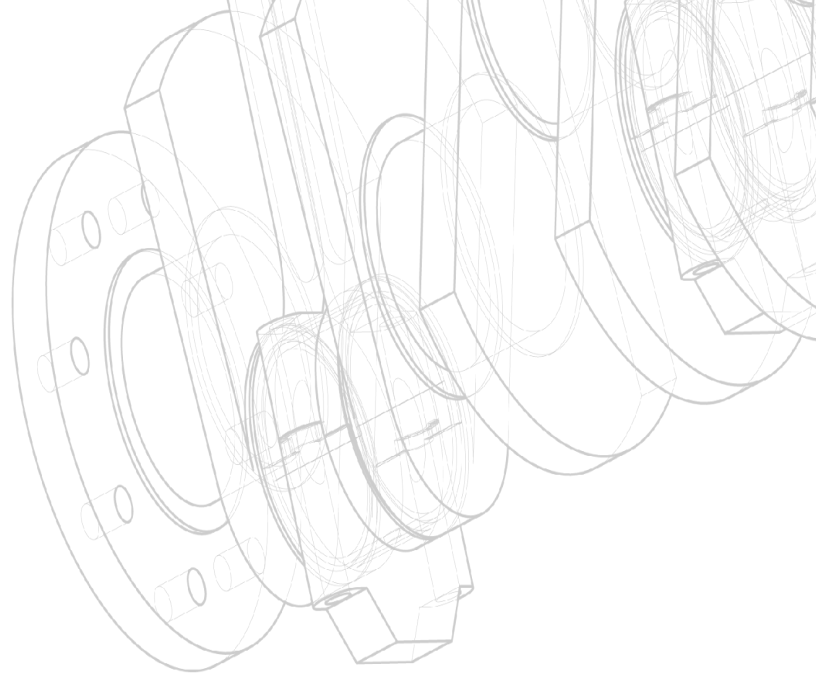
**“We haven’t built any value into the deal”**

**“We don’t know if this is high enough of a priority”**

AND ... with organizational pain identified, **we are committed** to doing everything you can to get them

AND ... if we haven’t built any value into a deal **we are committed** to doing everything we can do get it done.

## NOTES:



# Mutual Project Plans

Co-build a project plan outlining the step-by-step process to successfully close the deal within a mutually agreed-upon timeframe.

# Rubric

| Outcome Plan                    | Yes | No |
|---------------------------------|-----|----|
| Permission to co-build?         |     |    |
| Their ideas first?              |     |    |
| Clear series of next steps?     |     |    |
| YES OR NO. Maybe is not allowed |     |    |
| Put in writing and confirmed?   |     |    |

# Co-Build Project Plan

| Step                                   | Decision | Who | When |
|--|----------|-----|------|
|  |          |     |      |
|  |          |     |      |
|  |          |     |      |
| <b>Red Light</b><br><b>Green Light</b> |          |     |      |

NOTES:



# As a result of this training I will...

1. Start Doing

2. Modify:

3. Stop Doing:

4. Help Others With: