

Your Name



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Glossary

This section is intended to explain some of the terminology used in the Lumina Sales Portrait. While we put a lot of work into structuring the information in a way that is easy to read, we understand that some supporting definitions might help you understand the content better.

The Six Sales Stages	The six stages combine to form the Lumina Sales cycle. Each stage is underpinned by four processes that suggest methods to deliver effective results at each stage of the cycle.
The 24 Sales Qualities	These qualities reflect your natural selling style and are underpinned by your personal traits.
Strengths	Qualities that aid you in the sales cycle
Possible Shortcomings	Qualities which may hinder your progress within a sales cycle; these qualities can be developed so that you can harness them more effectively
Overextended	Qualities which have been overplayed to the extent that they can negatively impact your sales cycle; these can be tempered to control their effects
Comes naturally	Natural ability within this area
Doesn't come naturally	These areas require more effort to utilise.
Inclined to overextend	The extent to which you have a tendency to overextend within this area
Not inclined to overextend	You are less inclined to overextend in this area.

If you are uncertain about the interpretation of the information in your Lumina Sales Portrait, please contact your Lumina Learning Practitioner.

The Six Stages in the Sales Cycle

Research & Acquire Market Knowledge

Effective Qualities
 Think outside the box
 Competitor Savvy
 Gather Data
 Emergent Research



Overextended Qualities
 Ungrounded Research
 'I know best' Research
 Analysis Paralysis
 Unbounded Inquiry

Prospect & Engage Clients

Effective Qualities
 Proactive Networking
 Purposeful Argumentation
 Methodical Prospecting
 Engage with Empathy



Overextended Qualities
 Random Networking
 Pushy & Blunt
 Process Driven
 Gives too much

Understand Needs

Effective Qualities
 Stimulating Ideas
 Voice of Reason
 Discerning Assessment
 Reflective Understanding



Overextended Qualities
 Creative Overload
 Critical
 Aloof
 Passive

Recommend Solutions

Effective Qualities
 Enthusiasm
 Convincing
 Detailed Proposal
 Co-creating



Overextended Qualities
 Overwhelming
 Pressuring
 Lost in the detail
 People Pleasing

Get Commitment

Effective Qualities
 Intuitive Close
 Decisive Close
 Due Diligence
 Collaborative Close



Overextended Qualities
 Chaotic Close
 Forced Close
 Tentative Close
 Conceding Close

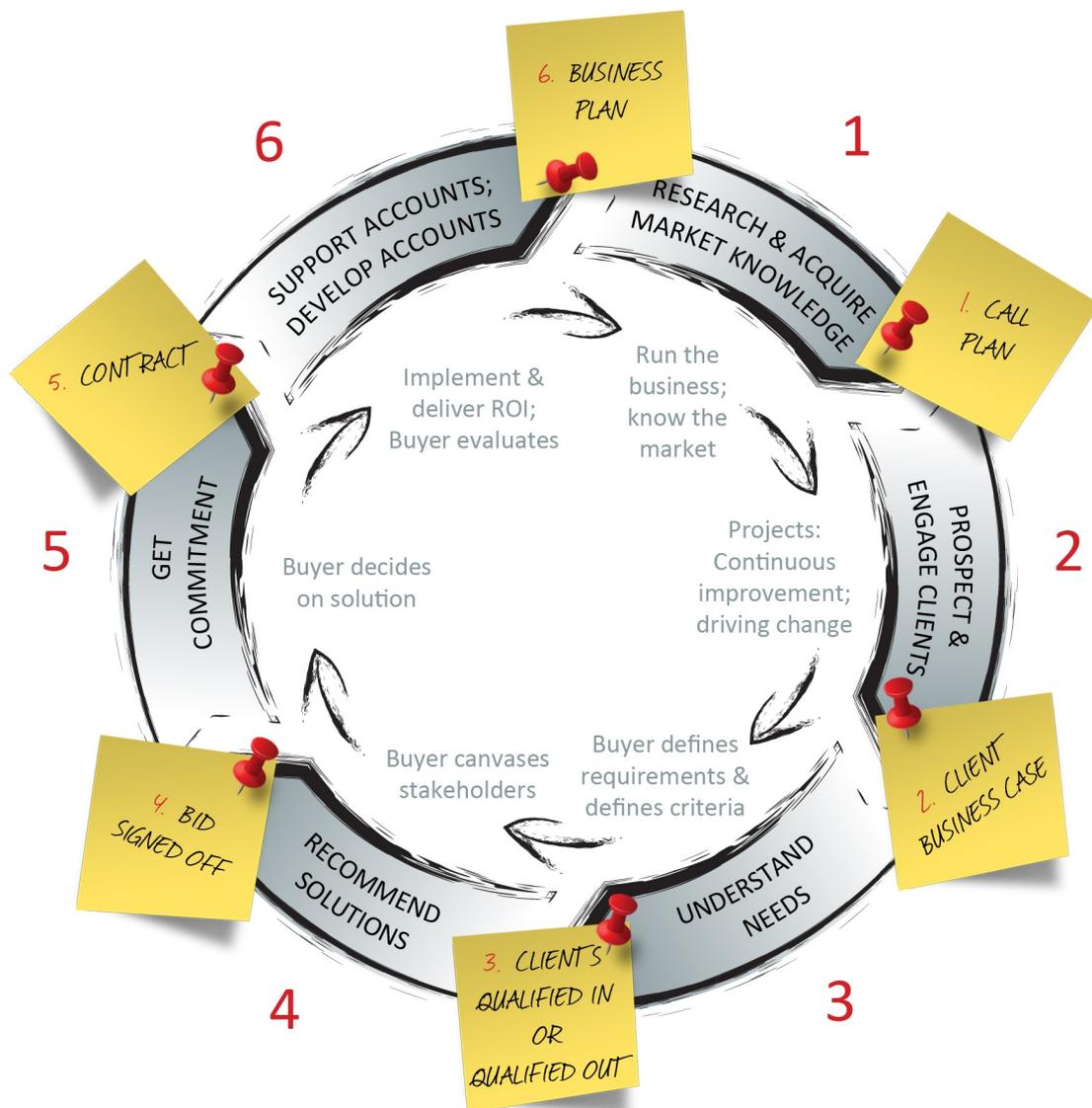
Support Accounts; Develop Accounts

Effective Qualities
 Galvanise Relationships
 Drive to Deliver
 Rigorous Execution
 Accommodating Service



Overextended Qualities
 Erratic Follow-through
 Impersonal Follow-through
 Bureaucratic Follow-through
 Acquiescing Follow-through

The Six Stages of the Buyers' Cycle mapped onto the Sales Cycle



GREY RIM - Six stages of the 'Sales Cycle'

INNER SIX SEGMENTS - Six stages of the corresponding 'Buyers' Cycle'

POST-ITS - Six key outputs - one for each stage of the Sales Cycle

The Six Stages and 24 Processes of the Sales Cycle



Research & Acquire Market Knowledge



Prospect & Engage Clients



Understand Needs



Recommend Solutions



Get Commitment

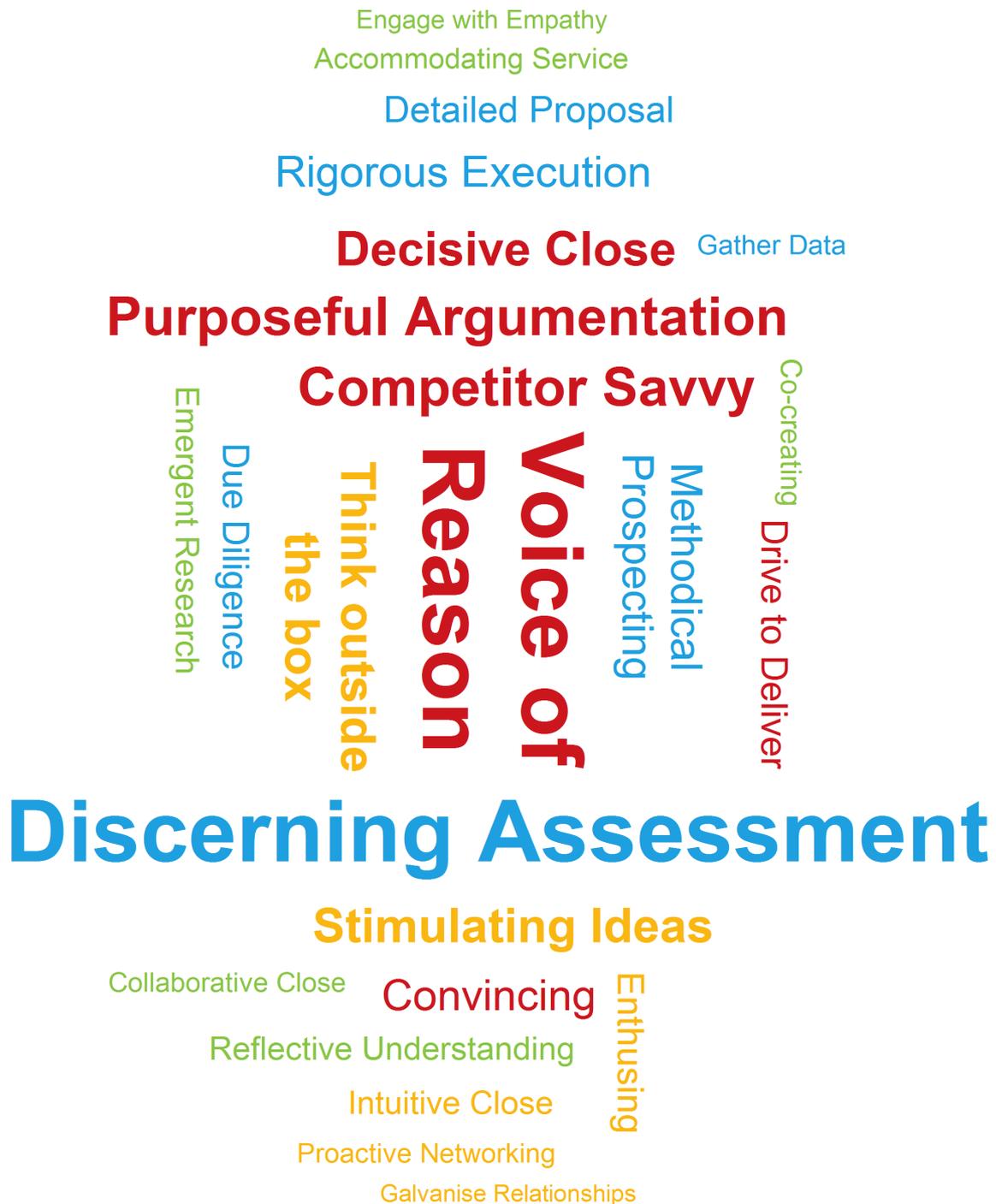


Support Accounts; Develop Accounts

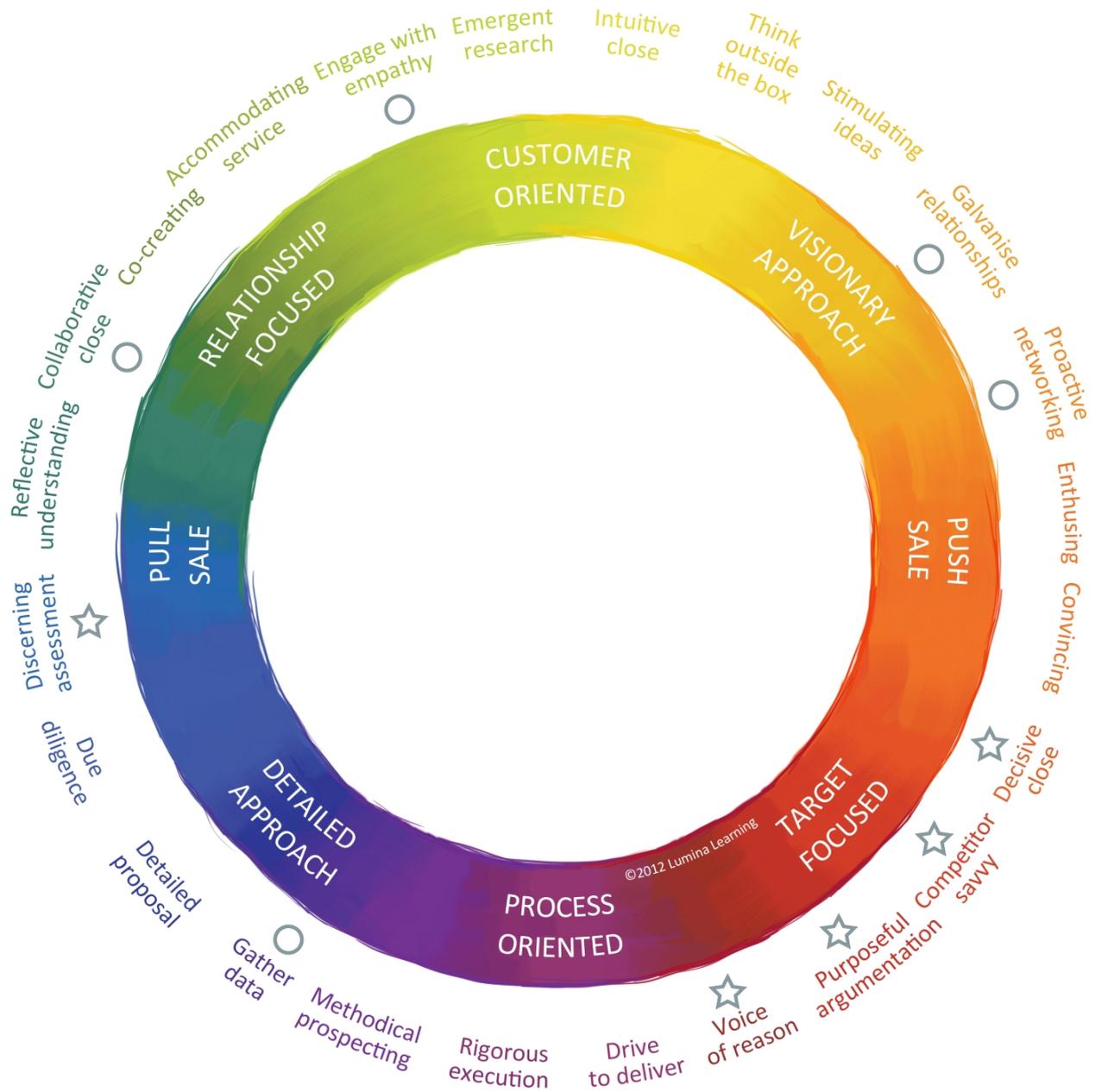


Exploring Your 24 Sales Qualities

Below is your personalised Sales qualities tag cloud. The bigger the font, the more of the Sales quality you are likely to possess.

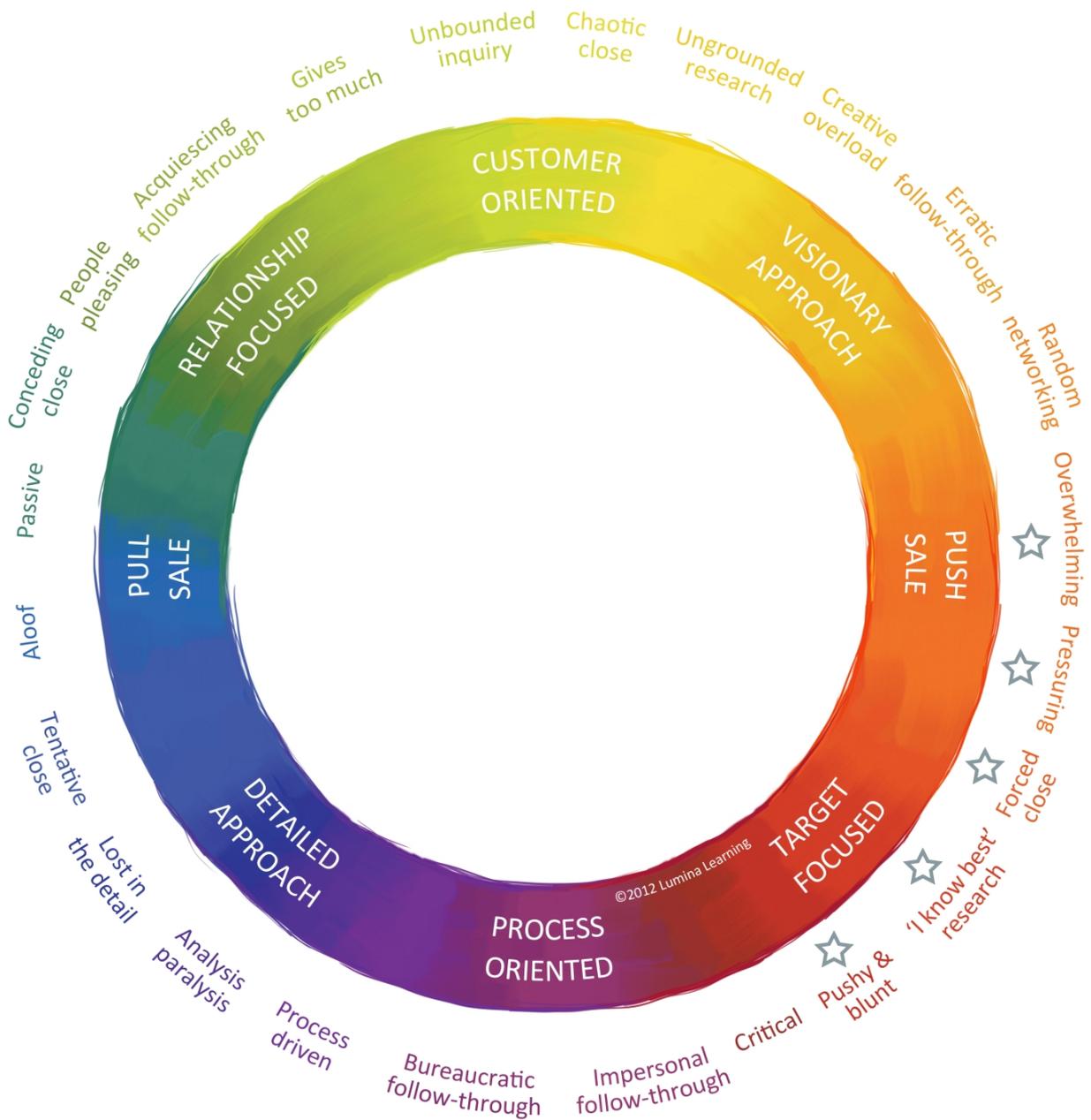


Your 24 Sales Qualities around the Sales Mandala



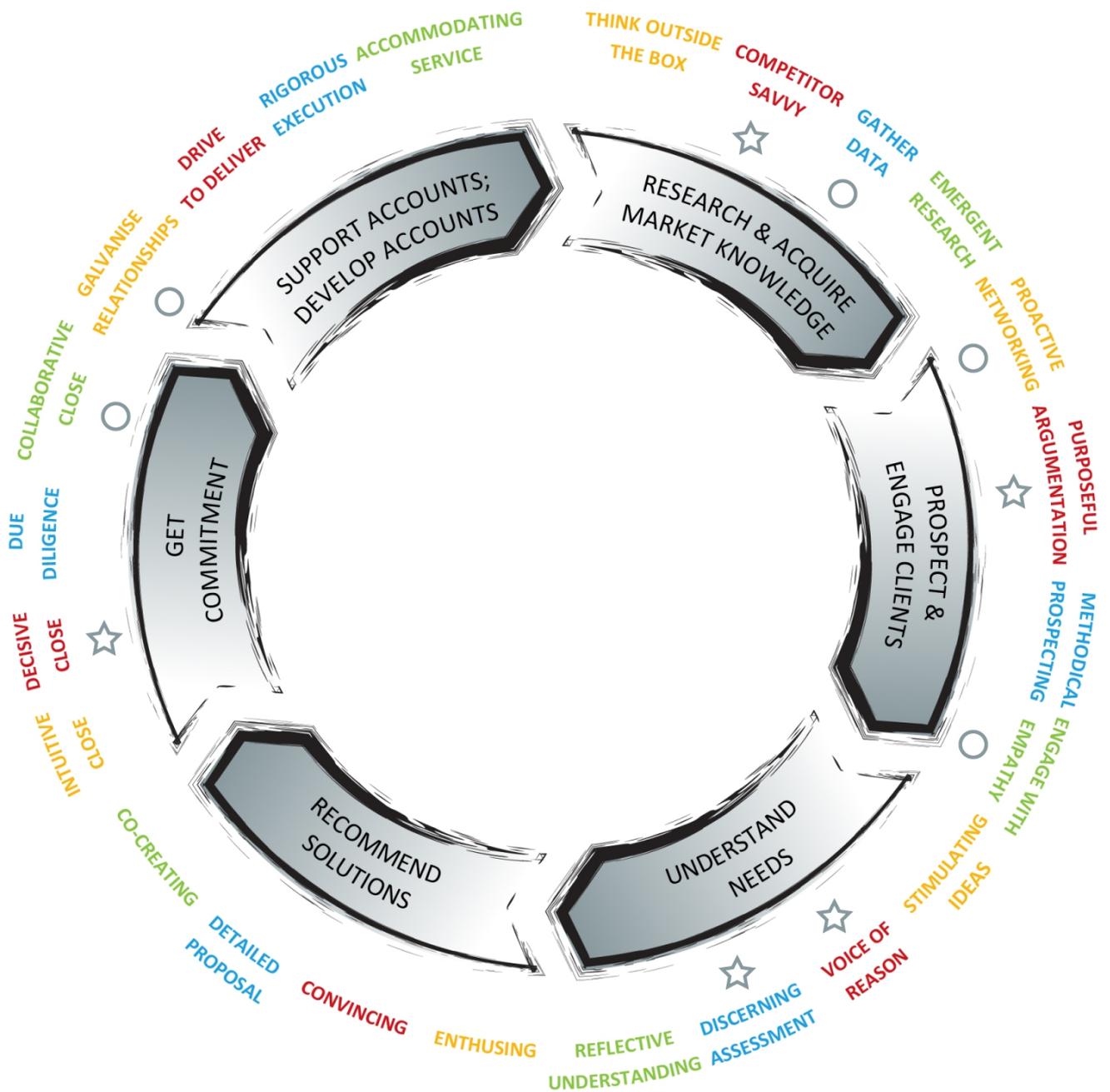
- ☆ - These are your 'top five' Sales qualities that come most naturally to you.
- - These are your 'bottom five' Sales qualities; they come to you less naturally.

Your 24 Overextended Sales Qualities around the Sales Mandala



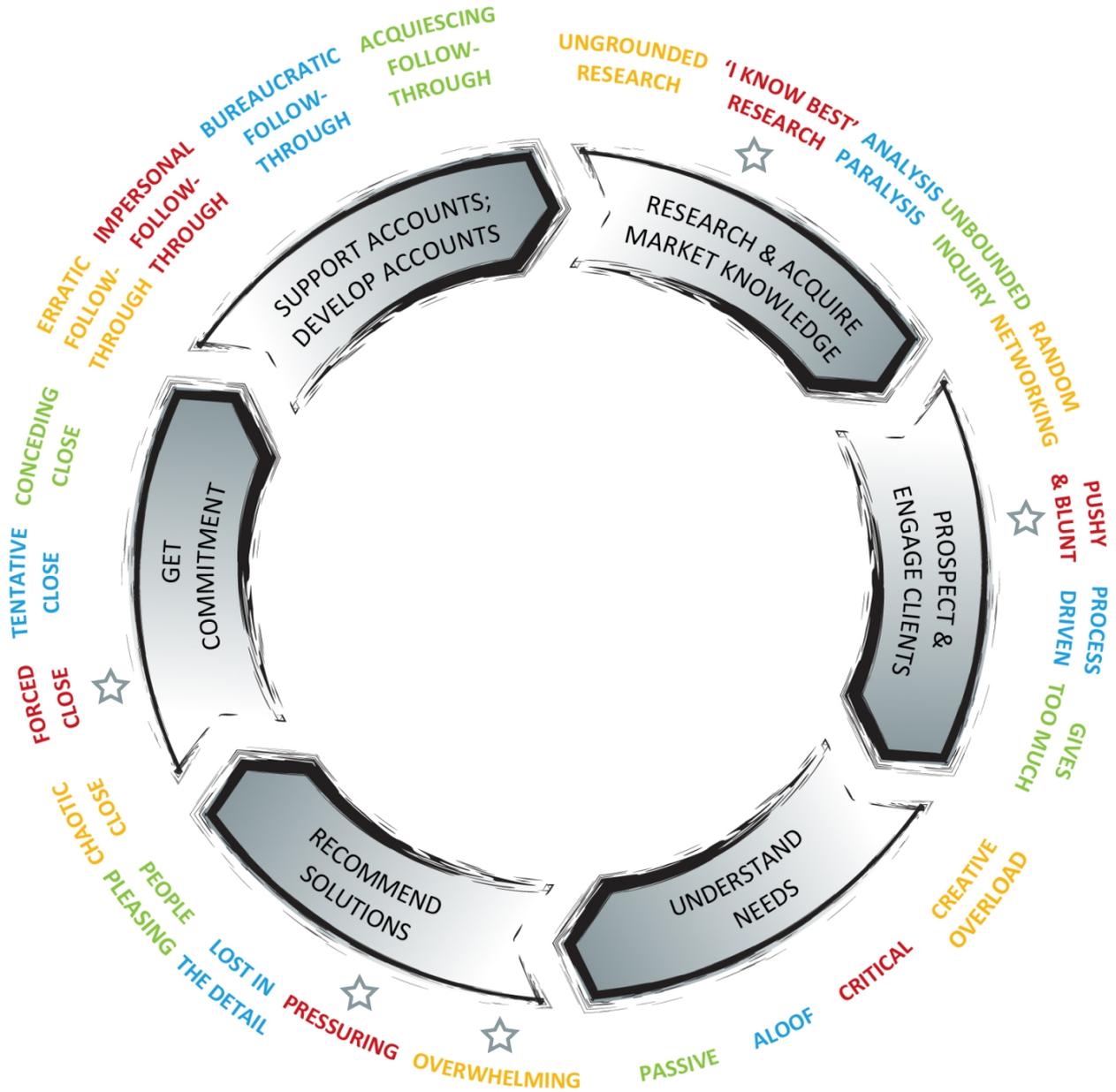
☆ - These are your 'top five' overextended Sales qualities.

Your 24 Sales Qualities – Assigned to the Six Stages of the Sales Cycle



- ☆ - These are your 'top five' Sales qualities that come most naturally to you.
- - These are your 'bottom five' Sales qualities; they come to you less naturally.

Your 24 Overextended Sales Qualities – Assigned to the Six Stages of the Sales Cycle



☆ - These are your 'top five' overextended Sales qualities.

Sales Qualities



Research & Acquire Market Knowledge



Prospect & Engage Clients



Understand Needs



Recommend Solutions



Get Commitment

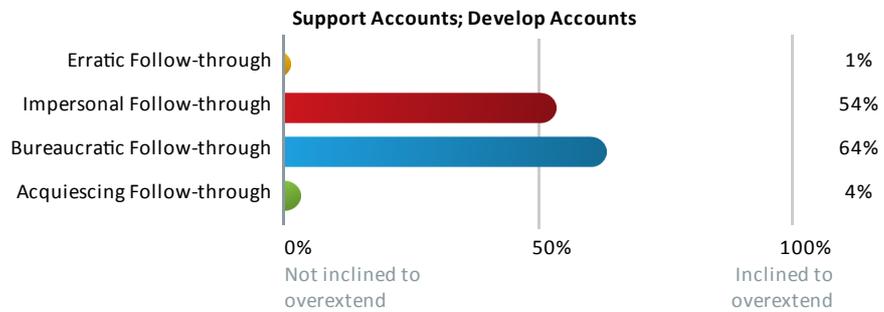
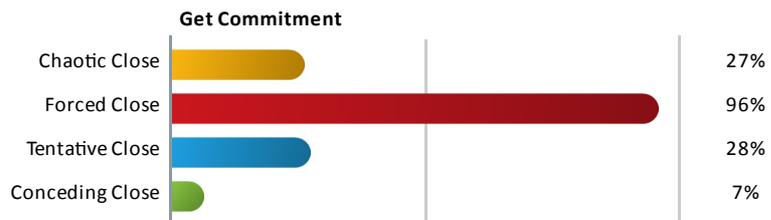
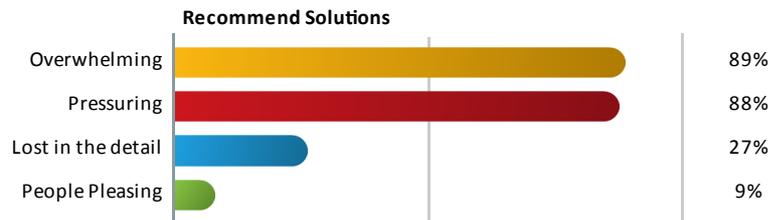
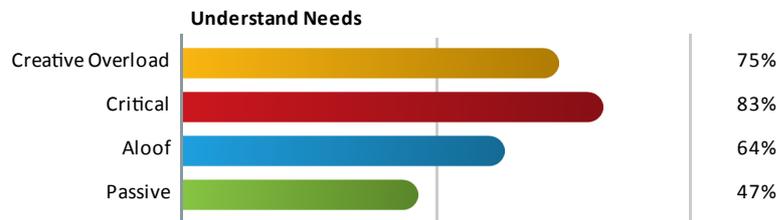
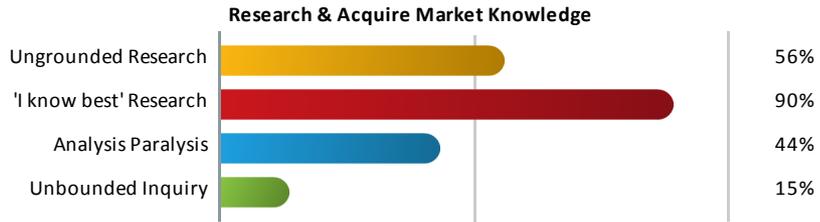


Support Accounts; Develop Accounts



0% Doesn't come naturally 50% 100% Comes naturally

Sales Qualities Overextended





Sales Process

Understanding current market trends is key in tailoring your offering and sales strategies to attract top clients. Research and preparation is thus vital, and must be both flexible and rigorous so as to gain a broad understanding of current market forces. This will be invaluable in innovating and distinguishing yourself from competitors.

To do this well you need to work through the following four-step process:

1. Know the market; know the competition
2. Identify key clients
3. Develop entry strategy
4. Build call plan

Sales Qualities

In order to work this stage well, you also need to demonstrate key behaviours – we call these your ‘Sales qualities’. You need to engage four different parts of yourself to do this well:

Think outside the box

Good opportunities do not readily present themselves and it may require an application of lateral thinking in order to locate them. In order to develop client relationships it is crucial that you form an innovative strategy around your understanding of the current forces that exist within the market.

Competitor Savvy

It is important to have knowledge of who your competitors are in the market. This insight will allow you to identify areas of opportunity where you can capitalise on competitors' weaknesses. It is always useful to know what you are up against so that you can effectively distinguish yourself.

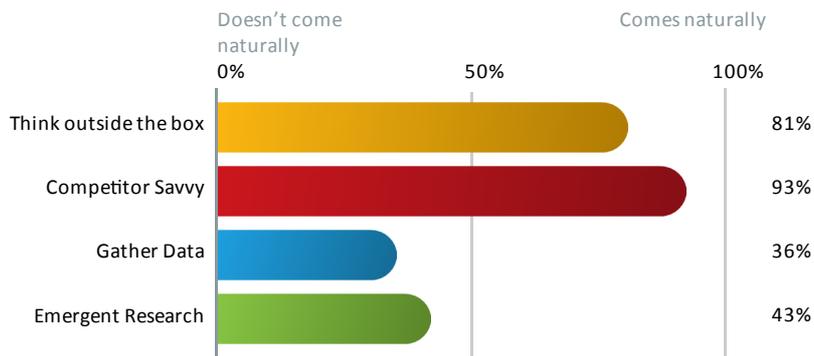
Gather Data

Having a concise knowledge of the facts and figures will assist in developing business opportunities. Before venturing out to secure a sale, gather enough evidence and data to support your work. Accurate and rigorous research is the key to a strong platform for an effective sale.

Emergent Research

Being able to identify current trends in today's unpredictable and ever-changing markets is a useful skill when preparing for a sale. In such a climate, an emergent research model is a very effective way of changing your approach in order to take new information on board.

Research & Acquire Market Knowledge



Your natural strengths in this stage:

- You take a step back and look at your client with a detached perspective to give yourself time to prepare without getting too close to them
- You come up with creative ways to overcome obstacles to your research progress, sometimes finding alternatives that others would miss
- Akie, you set yourself a step-by-step plan for preparing yourself to meet your client and then you discipline yourself to follow that plan

Possible shortcomings in this stage:

- Active listening does not come naturally to you and this can cause difficulties as it is often an integral part of research when interviewing others
- Research can become very detail-oriented and this is not one of your core strengths so it can be hard for you to apply a sufficient level of rigour to the research process
- You can find it tricky to go with your instincts when you are drawing conclusions from your research and this can leave you with too many options to handle

How to develop the qualities in this stage:

- Don't be afraid to draw upon your network to provide you with support if research does not come easily to you or if you feel isolated in your efforts
- Actively gather feedback on your client's communication preferences so you won't feel lost during face-to-face interactions
- Try to be more open-ended with your research goals so that your ongoing research is as broad and effective as possible



Preparation is a key part of any successful sale and it's always important to gather sufficient information on a client as you try to design the perfect pitch. However, excessive research and planning can be costly and can have a negative impact on the actual sale itself by stifling new opportunities and possibilities that may arise as you deal with a client. Furthermore, basing your judgement and approach on set facts and figures can give an unimaginative, rigid impression of your services that can leave the client feeling uninspired.

Ungrounded Research

Researching the market for new opportunities is paramount, but it can be a costly investment in time and resources. Without the correct guidelines your research can become general and irrelevant to the client at hand. It may be useful to map out the course of your research beforehand.

'I know best' Research

When research is based too strongly on your own directions you may risk neglecting potentially fruitful avenues of enquiry. You may be left with little more information than that which you started with. Try to identify the best possible research techniques and apply them accordingly.

Analysis Paralysis

An overwhelming, indiscriminate body of data can be confusing to interpret and become a hindrance to effective sales process as you can become stuck in analysis and indecision. Centralise data and information in order to recognise the accurate material and filter out the bits you need.

Unbounded Inquiry

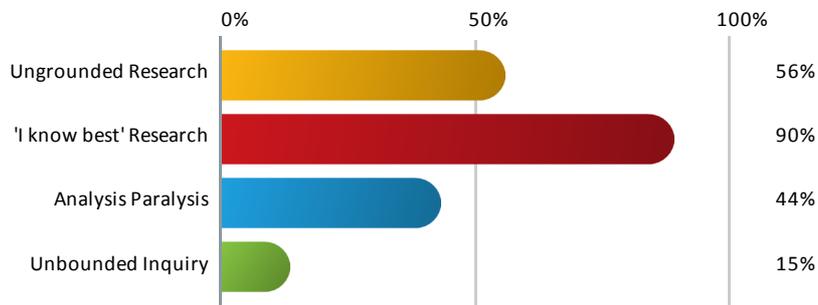
Changing your research approach too frequently can stop you from being able to complete it in enough depth. Knowing when to rein in your flexible approach will allow you to garner the necessary detail from your research and ensure you don't spread yourself too thinly.

Research & Acquire Market Knowledge - Overextended



Not inclined to overextend

Inclined to overextend



Some ways you may overextend in this stage:

- You can be too fixated on getting your research done perfectly and this can cause you to feel unnecessary time pressure
- Sometimes you overanalyse your research and can be too critical of the data before even seeing the client
- You can be a bit too creative at times and this means that the research you carry out can lack applicable substance

How to temper your overextension in this stage:

- Try and acknowledge when your ideas are becoming too fanciful so that you can ensure all the conclusions you draw about the client are based around their actual needs
- Try not to be overly selective in the information you gather and end up dismissing potentially valuable leads
- Don't be too ambitious with your research and avoid criticising yourself for not being perfectly prepared

Sales Process

Prospecting is the crucial sales stage where initial contact occurs. It is firstly important to sieve through a wide network to attract diverse potential clients and establish strong market presence. It is then vital to forge strong rapport with the potential client through a robust business case and clear awareness of their specific demands.

To do this well you need to work through the following four-step process:

1. Access & engage stakeholders
2. Create value hypotheses
3. Purposeful argumentation to shape business case
4. Dialogue with clients on the business case

Sales Qualities

In order to work this stage well, you also need to demonstrate key behaviours – we call these your ‘Sales qualities’. You need to engage four different parts of yourself to do this well:

Proactive Networking

Knowing how, where and when to network is crucial! It is important to actively manage and expand your network as such contacts can lead you to immediate opportunities as well as helping you maintain a strong presence in the market.

Purposeful Argumentation

It is important to know how to sell your services to existing and potential customers. Engaging clients with a robust business rationale can help ensure that they are fully convinced your offering will meet their needs.

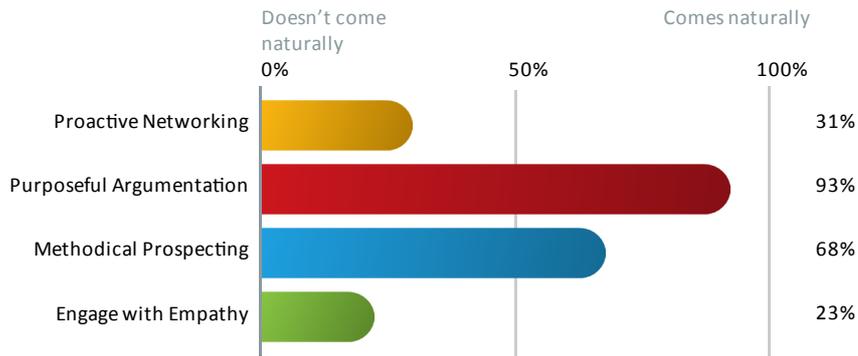
Methodical Prospecting

As you begin engaging with clients it can be useful to take action and identify useful sales methods. By diligently following pre-established strategies you can increase your chances of success in the knowledge that you know exactly where you are headed at any given stage of the sale.

Engage with Empathy

Sales and business opportunities are important, but so is maintaining a strong, open rapport with clients. Building a sense of mutual trust and respect is a highly effective way of engaging clients and making them feel comfortable when working with you and sharing their needs.

Prospect & Engage Clients



Your natural strengths in this stage:

- You are willing to entertain bold new strategies to ensure you capture the attention of big clients
- You spark the interests of your clients by making sure they feel you are offering them something they really need
- Your ability to grasp abstract ideas and possibilities helps you work effectively with even the most ambitious clients

Possible shortcomings in this stage:

- You can find the exercise of maintaining a wide network in order to reach out to potential customers draining
- You can have trouble reading your clients' emotional responses and this can make it hard for you to decide on the best way to progress
- Sometimes your systematic approach of selling can end up failing to express the full extent of your offering to a potential client

How to develop the qualities in this stage:

- Try and be more willing to alter your proposal so that you can broaden your appeal to a wider range of clients and their needs
- Don't be afraid to engage sceptical clients with first-hand experiences and case studies
- Don't be afraid to communicate with your client on a serious one-to-one basis; they might appreciate the depth you are willing to go to

Prospect & Engage Clients - Overextended



When you are prospecting and connecting with a client it is important to recognise the way the mood is shifting. If you can sense that you are losing the client's interest it is important to maintain the momentum of the sale through to the end by evolving your initial proposal as the sale progresses. However, you must not lose track of your initial targets as if you stray too far from the initial pitch to please your client you may decrease the business prospects in the opportunities you have created. Maintaining a relationship is important but bear in mind the costs involved in any compromises you make.

Random Networking

Networking should be kept in line with your business goals. Maintaining a growing and healthy network is important but if you become too embroiled in social relations it can become a waste of precious time and resources. Therefore, avoid any prolonged periods of socialising if you are not getting anything to show for it.

Pushy & Blunt

People can struggle to connect with your aims and be put off by your clinical approach. Diplomacy is vital when approaching customers and potential clients. As you try and seize opportunities make an effort to avoid becoming too assertive and direct in your handling of people.

Process Driven

Establish and explore different avenues to expand your business pursuits. Persistently sticking to the process in order to 'play it safe' may result in losing out on the opportunity to explore broader possibilities with a client. This can negatively impact the chance of further business.

Gives too much

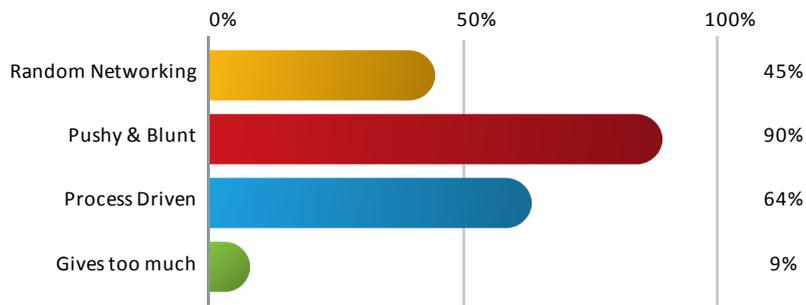
Making a personal connection with clients can sometimes be very draining. Stay alert to the possibility that engaging with a client is proving more draining than anticipated. Be firm with yourself and stop the sale if it will prove detrimental to you instead of trying to keep the client happy.

Prospect & Engage Clients - Overextended



Not inclined to overextend

Inclined to overextend



Some ways you may overextend in this stage:

- Sometimes you force clients into agreement as a result of your desire to build lasting, evolving relationships
- At times you can go overboard with your positivity and enthusiasm and overwhelm the client
- At times you adopt an argumentative tone with clients and end up playing the devil's advocate, ignoring their needs

How to temper your overextension in this stage:

- Spending too long planning your strategy and following a set of steps to interact with your clients can make you seem slow-paced and uninspiring
- Don't limit your efforts solely to prospecting for clients so that you remain open to other types of business opportunities
- Be careful when making an immediate competitive approach towards clients as it might reflect your own interests rather than theirs

Understand Needs



Sales Process

Constant interaction is the key to understanding the client's preferences, communication style and needs. It is thus important to stimulate the client with insightful questions and your full attention. Fluid, consistent communication will enable you to identify and address their concerns and assures them your delivery will be first-rate.

To do this well you need to work through the following four-step process:

1. Qualify client in; qualify client out
2. Understand client decision process & buying criteria
3. Go? No go? Assess probability of making the sale
4. Internally - secure funding to design a solution

Sales Qualities

In order to work this stage well, you also need to demonstrate key behaviours – we call these your 'Sales qualities'. You need to engage four different parts of yourself to do this well:

Stimulating Ideas

Continuously developing ideas will help you to inspire your clients. It's always important to enthuse the client with your ideas and solutions. This can be done by taking a creative approach when addressing their needs and demonstrating that you can provide them with a range of answers.

Voice of Reason

By utilising an analytical approach you can quickly identify the areas where you may be able to support a client. By using a focused and rational approach you can help bring clarity to a client's situation and construct various possible solutions.

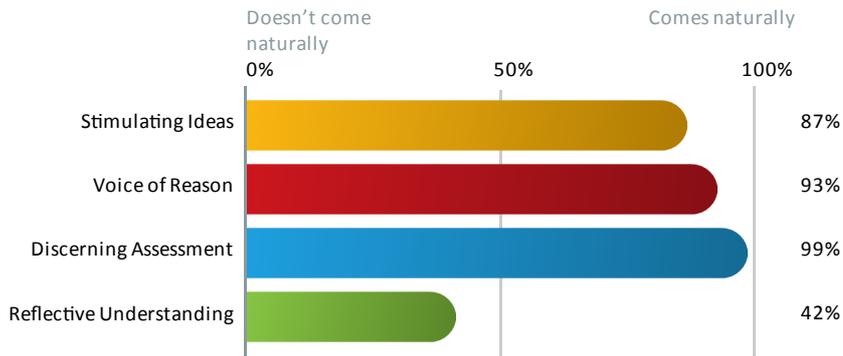
Discerning Assessment

In order to ensure their satisfaction it is crucial that clients are kept informed and up to date at every stage of the process. It is always important to ask the client for their thoughts and feedback. This allows you to get a complete picture of a client's situation and how you can help them address it.

Reflective Understanding

Client concerns should be a number-one priority. It is essential to always give your clients the chance to air their views as they will be more willing to engage with you and share their concerns if you make it clear that they have your full attention.

Understand Needs



Your natural strengths in this stage:

- You have a knack for distilling your client's needs down to their basics and finding ways you are capable of meeting them
- You balance being direct and to the point with a keen willingness to listen to your client's needs
- You are good at going into a client meeting without a strict agenda, and showing your willingness to listen

Possible shortcomings in this stage:

- You can have difficulty giving your client the freedom to set the agenda about what they want to discuss
- Akie, you may have difficulty working with others when communicating as a group with a potential client; sometimes you find yourself at cross-purposes with your colleagues
- One-to-one conversations do not come easily to you and it can be difficult for you to connect with a client in these circumstances

How to develop the qualities in this stage:

- Don't shy away from building an emotional connection with the client if it helps them express themselves
- When a client prefers to base their views on the solid data try to follow suit by providing them with the right materials to win them over
- Don't be afraid to communicate with the client in a more informal manner if it helps them express themselves

Understand Needs - Overextended



When you face a client, listening effectively is crucial for building rapport as well as for identifying the client's needs. However, if you overextend in this skill you may become passive and forget to address your own goals, as well as failing to maintain a strong flow of communication whereby both parties understand each other's needs. Keeping your own agenda in mind as you start to build your relationship with the client is important not only to account for your own interests but also to keep the process focused and dynamic.

Creative Overload

A mixed approach is important; when you go overboard with your creativity your innovation can overwhelm the client and put them off from working with you and sharing their needs. Sometimes a more grounded approach can lead to better engagement with a client.

Critical

Meeting goals and aims is important but so is connecting at a personal level. Your desire for results and progress may be perceived as aggressive and the client might shy away and feel uncomfortable disclosing too much to you. Make a point of listening to their personal concerns.

Aloof

There is a chance that clients may view a considered approach as too detached from their actual needs and this can make them withdraw from you. Give a customer a comfortable environment to air their views and keep your attention in tune with their expectations.

Passive

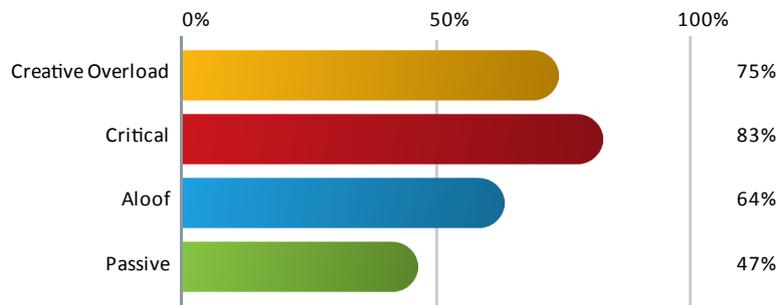
Without airing your views it can be hard for clients to know that you understand their situation. It is important to show the client that you are fully engaged and sensitive to their thoughts and concerns. If you do not demonstrate your understanding you may come across as uninterested in the eyes of the client who may then feel uncomfortable speaking openly.

Understand Needs - Overextended



Not inclined to
overextend

Inclined to
overextend



Some ways you may overextend in this stage:

- There are times when you are so busy analysing what has been said that you are unable to give your client's needs your full attention
- There may be times when your clients can become too inventive because of your encouragement and they can start to express unfeasible ideas
- Occasionally you can interrupt your client's train of thought with new ideas when they already have a clear picture of what they want to say

How to temper your overextension in this stage:

- Don't be afraid to proactively push forward discussions as being too passive means the client can lose energy quickly from having to be the only voice in the room
- Be aware that appearing too serious may give your client the idea that you disapprove of something they are saying
- Listening is important when understanding the client, however don't forget to prompt your client with questions if the conversation stalls

Sales Process

Your proposals play a vital role in winning the client over to your offerings. A proposal must be thorough so that the client is clear on what you are offering. You must also enthruse the client to enrol them into working with you in the long term. A strong relationship based on trust and openness is just as effective as an enticing proposal.

To do this well you need to work through the following four-step process:

1. Co-create a client-centered solution - define deal structure
2. “Know thy self, know thy enemy” - dispatching competitors
3. First presentation of proposal to client
4. Internally - secure funding to make a bid

Sales Qualities

In order to work this stage well, you also need to demonstrate key behaviours – we call these your ‘Sales qualities’. You need to engage four different parts of yourself to do this well:

Enthusiating

By exciting your clients through energising and stimulating them you can quickly build a dynamic rapport. Doing this will enable you to draw answers from them in order to evolve your offering and address their precise needs. Maintaining a dynamic approach will boost client interest when you make your recommendations.

Convincing

When making a proposal it helps to demonstrate the ability to serve your client base with confidence. When recommending solutions to a client you must be able to convince them that your product is robust and that you can guarantee them the service you are promising.

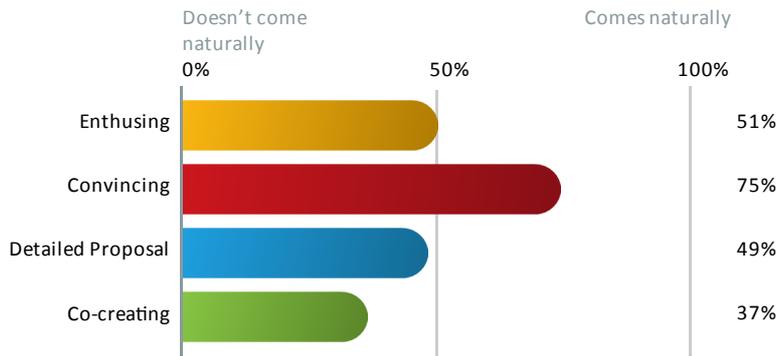
Detailed Proposal

A proposal should always reflect the quality of your offering. It is important that you include all the details which you believe may be relevant for the client. Presenting your products and services to clients with a clear plan of action backed up by past results will encourage clients to select your solution.

Co-creating

Negotiation and willingness to compromise can be valuable when shaping your sales offering. Displaying a desire for shared success and demonstrating willingness to work together is an effective way to win the client's trust. By working to the client's needs and making compromises when necessary you can ensure maximum satisfaction.

Recommend Solutions



Your natural strengths in this stage:

- Being quite the sceptic yourself, you are good at anticipating criticisms of your ideas and refining your proposals before you deliver them
- You take the time you need to formulate your ideas before you say them, ensuring the pitches you deliver are well-considered and hold weight
- Motivated by a desire to race ahead of the competition, you use the pitch as an opportunity to highlight the biggest advantages you can offer over your competitors

Possible shortcomings in this stage:

- Proposals born from instinct can be quite demanding for you to present and this can make it hard to connect with clients who prefer that sort of communication
- Presenting in a one-to-one situation is not your forte and you can appear uncomfortable in front of a client
- Sometimes you can struggle to reinforce your proposal with facts and figures, which can discredit you in the eyes of some clients

How to develop the qualities in this stage:

- Try to inject additional enthusiasm into the pitch when you find your rapport with the client is losing energy
- When you are pitching don't be put off by clients who prefer a more informal approach to proposals
- Don't be afraid to change your proposal partway through a conversation if it can seal the deal

Recommend Solutions - Overextended



The clarity of your vision and ideas is important in order to leave a lasting impression on your client when you are pitching. Overextend in this domain however and you can become imposing and inauthentic, damaging your relationship with the client and endangering the sale. When you are pitching make sure that your proposals leave enough room to be tailored to win over the client when difficulties and breakdowns in communication arise; the success of your sale can hinge on your willingness to adapt and compromise where necessary.

Overwhelming

Positive energy can sometimes be taken too far. If you keep on enthusiastically pushing your solutions on to the client they may feel overloaded with options. It is important to give them time to digest and reflect on your solutions and thoughts.

Pressuring

It is important not to come across as too forceful when trying to convince the client that your offering is what they are looking for. They might feel put off by your directness and feel rushed into making a decision. Be prepared to back off and listen to their feedback, adjusting the proposal if necessary.

Lost in the detail

The desire to make the perfect proposal can lead to hesitation and a lack of action. You can end up stuck in indecision trying to find the best way to win the client over. Focus on the first steps and demonstrate the feasibility to the client first before trying to hone the sale completely.

People Pleasing

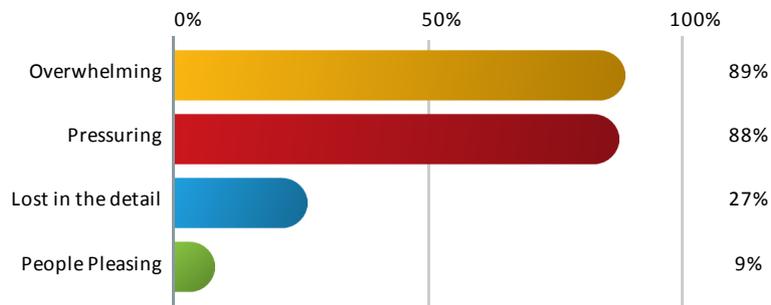
Accommodating your client needs is central to the business pursuit, but it is important not to overcommit when you customise solutions to address the needs of your client as this can lead to future difficulties when actually delivering.

Recommend Solutions - Overextended



Not inclined to overextend

Inclined to overextend



Some ways you may overextend in this stage:

- Under pressure your proposals can become too energetic and your enthusiasm can overwhelm your client, distracting them from the point of your pitch
- Sometimes you come across as controlling in meetings and your proposals can occasionally come at the expense of someone else's time to speak
- Sometimes your proposals can be quite dry because of your exaggerated use of facts and details

How to temper your overextension in this stage:

- Avoid being too creative in your proposals as the way you jump from idea to idea can be hard for a client to follow
- Be careful when you decide on a more assertive approach with the client as it can intimidate them away from your proposal
- Try to temper the focus of your proposals so that your clients feel they have more room to work with when it comes to their targets

Get Commitment



Sales Process

Once your clients are in a buying mindset you must gain their commitment and seal the deal, remaining attentive to the client's signals so that you can capitalise appropriately. It is vital to maintain their trust by displaying a willingness to address their concerns. When all the signs are there you must seize the opportunity and act decisively.

To do this well you need to work through the following four-step process:

1. Document "best & final offer"
2. Final presentation of proposal to client
3. Negotiate with client
4. Due diligence & signing client contract

Sales Qualities

In order to work this stage well, you also need to demonstrate key behaviours – we call these your 'Sales qualities'. You need to engage four different parts of yourself to do this well:

Intuitive Close

Be intuitive to client needs and potential business ventures. When you can sense that the client is open to the idea of accepting your proposals it is important to trust your instincts and truly seize the moment by acting decisively.

Decisive Close

It is important to firmly secure the deal and enrol the commitment of the client once you know all the details have been discussed. By pushing for a final answer you can ensure that the sale reaches its conclusion before you risk losing a client's interest.

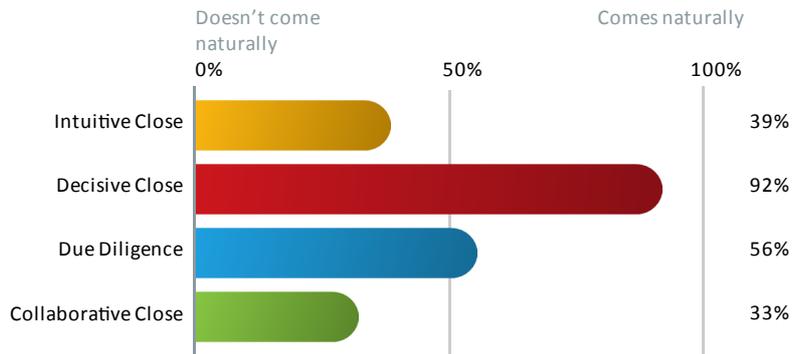
Due Diligence

Details are important and they can make or break a deal. Clients will be reassured if they know that nothing has been overlooked and everything has been clarified thoroughly. This will allow both parties to progress knowing that there are no hidden obstacles and that the sale will proceed smoothly once an agreement is reached.

Collaborative Close

An effective way to completely enrol the client is by closing the sale on a relationship basis. This can be done through a combination of a personal connection and professional understanding. By making it clear that you are considering their needs as well as your own you can assure the client of your win-win approach.

Get Commitment



Your natural strengths in this stage:

- You push clients through a logical process that begins with expectations and finishes with commitments
- You balance implementing new ideas with a need to establish firm commitments with a client
- You balance your desire to win a sale at any cost with a good knowledge of what promises you are actually able to commit to

Possible shortcomings in this stage:

- If your client frequently wants to change their minds about elements of the sale you can have difficulty altering the accord quickly enough to secure the sale
- As you can struggle to secure an instant rapport with a client it can take some time before they feel connected enough to commit to you
- Sometimes your sympathy for others is not apparent and your client can feel that you have not considered their needs sufficiently when you are reaching an agreement

How to develop the qualities in this stage:

- To ensure a smooth sealing of the agreements make sure any final commitments on both sides are not at odds with each other
- Try to use case studies and past experiences to reassure the client if they get "cold feet" in the latter stages of the sale
- Don't be afraid to rely on your gut instinct to act decisively in order to quickly seal the deal for the client when the opportunity presents itself

Get Commitment - Overextended



As your clients become keen to commit to an agreement it is important to act fast and be decisive so that you can fully seize the opportunity. However, don't lose your patience and consistency at the final hurdle trying to push them to commit. Moreover, being overly flexible can damage your interests and credibility. So long as you maintain the relationship through to the end of the sales process you will have a stable platform to fall back on in instances of last-minute breakdowns.

Chaotic Close

Spontaneously jumping to conclusions and rushing the client into making a decision can be dangerous as it can be perceived as erratic and insensitive. Take a level-headed approach to client-based commitments, leaving time for both sides to consider the ramifications of their decisions.

Forced Close

When the focus on the outcome is overplayed it can risk making the client feel uncomfortable. There is a further danger that clients can lose faith in the sale at the last minute if it is pushed too hard. Make an effort to recognise valid concerns and give space to other points of view.

Tentative Close

When the sale is coming to a conclusion it is important to avoid grinding the process to a halt with indecision. You can lose the client's enthusiasm if you become too systematic in your desire to cover every detail. Try to stop at a workable level of detail and fill in the rest of the proposal further down the line.

Conceding Close

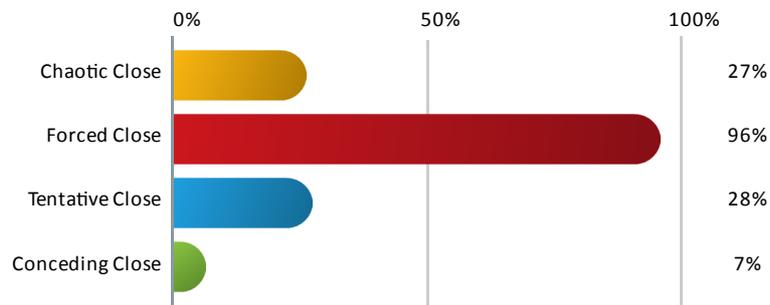
There is a chance that a people-oriented approach can lead to watered-down resolutions. This can lead to a weaker sale overall and uncomfortable commitments. Try and avoid changing your proposal beyond predefined limits. This will require a level of discipline when it comes to balancing good service to clients with good business results.

Get Commitment - Overextended



Not inclined to
overextend

Inclined to
overextend



Some ways you may overextend in this stage:

- You can occasionally come across too strongly in your negotiations and you do not always know when to back down from an untenable position
- Sometimes your attention to detail can overextend and be seen as 'nit-picking' by your clients when it comes to contractual arrangements
- Sometimes clients may feel locked into your process and unable to input their own considerations into the contractual sale

How to temper your overextension in this stage:

- Don't force your personal targets and goals on to the client so that the sale is an organic process until the end
- Don't be too overt with your attempts to control the contractual sale as this can upset the client
- Be careful not to come across too assertive in negotiations as it is important to make the right concessions in order to seal the deal



Sales Process

Maintaining and enhancing your relationship with a client is important, allowing you to reap the rewards of your previous work and secure repeat business. Sustaining this relationship is as important as high-quality delivery. Make sure that when delivering you strengthen your relationship by sharing your energy and service ethos.

To do this well you need to work through the following four-step process:

1. Shift from winning sales to service delivery
2. New order process & sales tracking
3. Create account business plan & supporting processes
4. Seek additional sales opportunities

Sales Qualities

In order to work this stage well, you also need to demonstrate key behaviours – we call these your ‘Sales qualities’. You need to engage four different parts of yourself to do this well:

Galvanise Relationships

Keeping up relationships and connecting with new people is an effective way to create new sales. It is also important to maintain rapport through continuous social engagement. This will keep you connected with your clients so that you can respond promptly to their needs.

Drive to Deliver

Clients want results even in the face of adversity. By showing your client that you believe in delivery at all costs they will feel that they can depend on you to provide the service they expect from the relationship. From this basis you can develop more ambitious goals for your clients and the relationship will flourish.

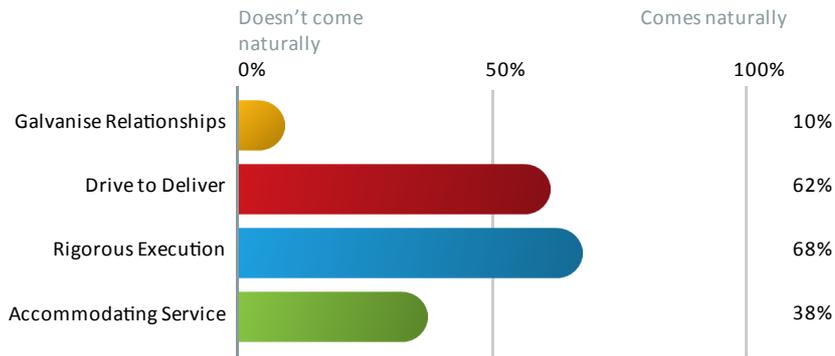
Rigorous Execution

When delivering on your commitments, planning the steps out in detail and ensuring that your estimates are accurate gives clients confidence that deadlines will be met. Clients will feel more at ease after they see evidence that you are dependable and organised.

Accommodating Service

Create an environment where customers can have input at any stage of the process. When you execute a plan in order to follow up on your actions make sure that the client feels fully involved and kept up to date throughout the process. This rapport is equally as important as the delivery as it reassures clients of your service mentality.

Support Accounts; Develop Accounts



Your natural strengths in this stage:

- You do not tolerate poor client service and are highly driven toward accumulating repeat sales
- You are good at keeping tabs on clients, often following up a sale in writing to gauge their satisfaction and offering opportunities to give feedback
- You are good at delegating some of the tasks around following up with clients to those around you, helping foster client satisfaction and repeat sales

Possible shortcomings in this stage:

- You can struggle to maintain a focus on shared success and your clients may start to feel that their interests are better served elsewhere
- You may be unable to meet your client's demand for an ongoing sales relationship that can adapt to suit their changing business needs
- You can have trouble incorporating your clients into your wider network and this can leave them feeling isolated

How to develop the qualities in this stage:

- When following through try to acknowledge any concerns the client might have regarding delivery so that there is a strong emotional rapport in the relationship
- Try to assure your client of your ability to deliver by giving them previous examples as well as keeping them up to date with the latest details on your progress
- Try to be sensitive to the changing nature of your relationship with a client at all times so that you are prepared to respond to their needs



Having secured a sale it is important to deliver against your agreed commitments. This follow-up phase is crucial to ensure that you can maximise all the business opportunities presented to you by the client. It is important to build on the existing relationship with immediate action, to show ongoing commitment and integrity long after the terms were agreed. Maintaining and growing your relationship is just as important as securing the sale in that it can open up new business via referrals or repeat purchases.

Erratic Follow-through

If you act in a rapid and unpredictable manner, it can sour and affect your relationship with the client. You can lose the trust of your clients if you become sporadic in your delivery on your commitments. Keep a clear record of your commitments to ensure that you do not lose track of them.

Impersonal Follow-through

There is a danger that being clinical and simply focusing on the outcome can damage the rapport between you and the client. They may be looking for a lasting relationship that produces new opportunities rather than just a one-off offering. Focus on a deeper, personal connection that can form the basis of a more effective partnership.

Bureaucratic Follow-through

If delivery is overplanned then new deliverables may be avoided and actual delivery can be held up by process. If you are not open to new opportunities then they can disappear and clients can feel let down. Try to build scope into your plans so that you have the room to take on new commitments as they arise.

Acquiescing Follow-through

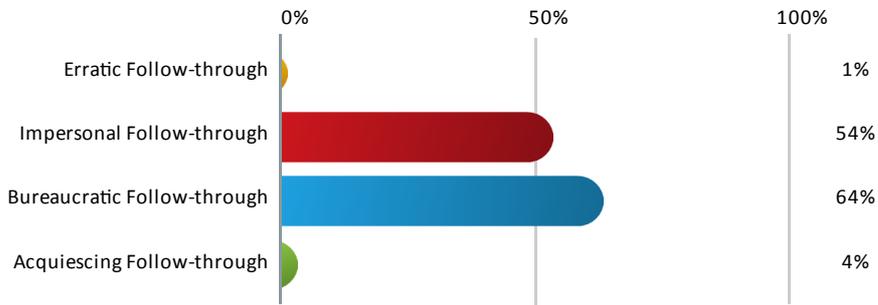
In your desire to keep the client feeling involved you may become too accepting and end up promising more than you can deliver. Try to avoid letting your connection with a client create an unspoken pressure on you to give more than you can manage. In order to avoid overstretching your resources draw a line in the sand and stick to it.

Support Accounts; Develop Accounts - Overextended



Not inclined to overextend

Inclined to overextend



Some ways you may overextend in this stage:

- When unforeseen developments arise you can have trouble making time for supporting your clients
- Your strong work ethic standards can become very demanding when you are maintaining a relationship with your clients and they can see you as pushy in this area
- Sometimes clients feel like you have abandoned their relationship with them when you delegate commitments to other people too often

How to temper your overextension in this stage:

- Bear in mind that your direct approach can come across as too blunt for your clients to feel comfortable in your ongoing relationship
- Be careful not to lose the relationship with the client by being too proactive and not giving them the chance to give you feedback as you deliver
- Don't depend too much on plans as you go about delivering on your commitments as unforeseen developments may derail the client relationship