



Business Development Skills for the Technical Field Force

Whatever their title—consultant, customer engineer, or services technician—all members of the technical field force can increase their value to their organization by taking an active role in business development.

Wouldn't you place a bet (if you were a gambling person) with the odds 20 to 1 in your favor? We think so, and so do many top-performing s-businesses that know the potential of providing their technical field force with business development skills and capabilities. Let's take a look at five reasons why this is such a good value proposition for you to consider:

1. In a recent s-business study, four of the seven delivery best practices of the top-performing service businesses included skills related to business development:¹

- Service providers demonstrate appropriate selling skills.
- Service providers possess adequate account management skills.
- Service providers understand process consulting.
- Service providers know the critical business issues of their customers.

The themes that consistently run through these best practices have a lot to do with customer relationship skills that are so necessary in not only technical consulting, but also in creating, leveraging, and expanding new services business. The unfortunate side of this point of view is that most service field professionals are good at delivering high-value technical services, but they don't do as well when it comes to building effective customer

rapport, probing for customer issues, understanding the company value proposition, and communicating and bonding with the customer. Consequently, "low-hanging fruit" opportu-

portant factors.

Without the evolution of a trusting relationship with a customer or client, nothing new (or good) ever happens.

4. Service providers are where

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nities to upsell are left on the table.

2. Depending on the type of services sold and the services strategy, service providers usually outnumber salespeople, and often the ratio is 20 to 1 or more. Just think of the power of increasing your selling capabilities twentyfold.

3. Service providers often have a high level of customer trust. As *Figure 1* shows, trust is such a critical success factor in business development that most of the research regarding clients' expectations of consultants places trust in the top three of all im-

portant factors. Who better understands the issues and day-to-day realities than a service technician who is in the building everyday and knows everyone from the facilities manager to the CIO? As they walk the plant floor or office hallways, eat in the lunchroom, and meet with technical staff, they become privy to a wealth of information specific to company issues, challenges, problems, and opportunities.

5. A small investment in building business development capabilities can yield a huge return. It has been our personal experience that an investment in business development training can be recouped in three to nine months. How does that compare with other investment opportunities?

Yes, you say, this makes sense, but isn't this quite different than the traditional role we would expect from our services field force engineers, systems integrators, or consultants? Well, "it all depends," as consultants like to say. From a traditional perspective, delivery professionals are responsible for:

- Bringing projects or assignments up to quality standards, on time, and within budget.

Figure 1

Client Expectations of Field Consultants²

1. Competence.
2. Credibility.
3. Trustworthiness.
4. Likability.
5. Business Savvy.
6. Responsiveness.
7. Empathy.
8. Communication.

- Setting, managing, and meeting customer expectations.
- Immediately implementing “service recovery” when work starts to go south.
- Responding enthusiastically when asked about their organizational capabilities.

These are important requirements of the technical field force, and many heads of operations would be on cloud nine if all their personnel could perform these functions. Yet, today’s top-performing technical field forces play an active role in business development. Following are six objectives that can help you determine the right business development expectations of your technical field force:

1. Focus on meeting services objectives and leaving all business de-

velopment tasks to sales:

“Hi Carol. Just a quick update to let you know that the service call was successful.”

2. When the customer mentions potential opportunities, communicate these opportunities to sales:

“Hi Carol. I overheard Billie Owens, the operations manager at NewCo, complain to one of her people about how limited their valve repair process was. Thought you’d like to know.”

3. Actively look and listen for customer opportunities, then pass them on to sales:

“Hi Carol. In my weekly debriefing with Billie Owens, I asked about what other technical problems they were having. The attached document outlines what was shared related to

their five biggest problems. Go get ‘em!”

4. Actively look and listen for customer opportunities, qualify the customer need, then pass it on to sales:

“Hi Carol. In my weekly debriefing with Billie Owens, I asked what other technical problems were giving her fits. She outlined five issues that were her biggest challenges. I then proceeded to qualify those challenges and found that there were two issues she was serious about acting upon. Attached are my qualifying checklists for these two needs and a few notes. Good luck.”

5. Actively look, listen, and research opportunities, qualify the need, and work with sales to develop proposals:

“Hi Carol. In my weekly debrief-

Figure 2

Business Development Readiness Assessment					
Success Factors	Ratings				
	Strongly Disagree				Strongly Agree
1. Our service field professionals possess business development skills.	1	2	3	4	5
2. Our service field professionals possess good customer skills and abilities.	1	2	3	4	5
3. Our service field professionals possess a trusting relationship with our customers.	1	2	3	4	5
4. Our service field professionals are rewarded and recognized for business development efforts.	1	2	3	4	5
5. Our service field professionals work well with our products and services sales force.	1	2	3	4	5
6. Our service field professionals have received formal training in how to do business development.	1	2	3	4	5
7. Our service field professionals understand our services, capabilities, and value proposition.	1	2	3	4	5
8. Our service field professionals understand service recovery techniques.	1	2	3	4	5
9. Our company has a customer engagement model.	1	2	3	4	5
10. Our service field professionals are good at listening and probing for client issues.	1	2	3	4	5

ing with Billie Owens, I asked her what other problems were giving her fits. She outlined five issues that were her biggest challenges. I then proceeded to qualify those challenges and found that there were two issues she was serious about acting upon. Attached are my qualifying checklists for these two needs and a few notes. What does your schedule look like for Tuesday? Maybe we can set aside 45 minutes to plan our approach and create a proposal for these two new potential projects."

6. Actively look, listen, and research customer opportunities, qualify the need, develop the proposal, and present it to the customer:

"Hi Carol. Just wanted to keep you in the loop. I'm pleased to say that Billie Owens, operations manager at NewCo, has agreed to two more projects! Attached you'll find the signed proposals and project plans. You'll note that the first one starts in two weeks. Let me know if you have

any questions.

Depending upon how willing and able your technical services field force is to assume the more proactive of the choices in a business development role, you will want to:

- Communicate the value of business development to all who touch the customer.
- Review your performance management systems (expectations, recognition and rewards, and feedback) to emphasize good business development.
- Train the technical field force in relationship skills and business development techniques.
- Coach, reinforce, and recognize new business development behavior and results.

To best gauge how ready your services technical field force is to assume business development roles, take the Business Development Readiness Assessment shown in *Figure 2*.

Let us not forget that those of us

involved in providing services to customers are really in a relationship business. Build solid customer relationships, sell more profitable services faster, and place your bets on your service technical field force to help you make 2003 a terrific year! ♦

References

1. Alexander, James A. 2002. The state of s-business: An international report of progress, performance, and best practices. AFSM International.
2. Alexander Consulting. 2000. Unpublished research findings.

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