

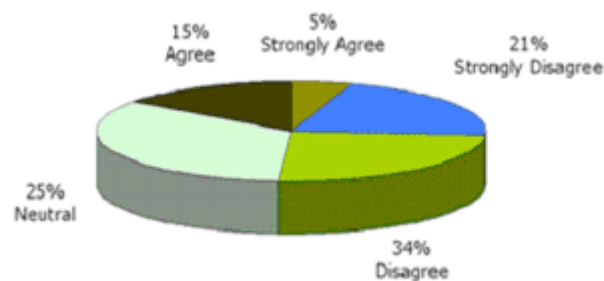
Professional Services Selling Assessment

By James A. Alexander, Ed.D.

Selling professional services is quite different from selling products — it requires new knowledge, skills and mind-sets, coupled with enhanced performance management systems and a selling process to support and reinforce new selling behaviors.

Many organizations that sell professional services are frustrated by their current services sales efforts, as services are either given away as part of a product sale or heavily discounted.

Ongoing professional services research conducted by Alexander Consulting supports this continuing problem.



Executives who lead professional services sales organizations are often too busy to assess the viability and effectiveness of their services sales process. The reality of their business today dictates quick decision-making and finding answers to services sales challenges to keep things moving forward in the right direction. In a blink of an eye, markets shift, customers jump ship to competitors, sales professionals leave, and new players in the company turn the services organization upside down — as new goals, objectives and services targeting your organization appear in your email just before you are about to head off for that well-deserved vacation!

So how do you get your arms around how your process and the sellers of professional services (product sales, services professionals, business developers and consultants) are performing against best services sales practices, when you need to determine if you're hitting the right targets or falling off a cliff? The answer is a professional services sales performance effectiveness audit.

Can You Answer These Questions?

Below are questions that Alexander Consulting is frequently asked by clients when they are frustrated with their services sales performance results:

- Can our sales force realistically sell more professional services with our current process in selected geographic markets?
- If yes, how big is the professional services sales gap? How long will it take to develop the necessary capabilities? What specific skills need to be acquired or developed to close gaps?
- What interventions are necessary to sell professional services?
- What is a realistic time frame to expect an increase in professional services sales capabilities?
- What are the selling strengths that can be leveraged and built upon to reach other geographies in a professional services sales role?
- What are the selling barriers to making this transition? How can they be eliminated or at least minimized across entire target markets?
- What are customers' perceptions related to our company's current professional services offerings?
- What measurement system and sales metrics can be established and utilized to effectively track professional services sales and individual performance?
- How aligned is the current portfolio of professional services to current and future needs?
- What value-based propositions need to be developed to meet customers' expectations?
- What new or enhanced services need to be developed to motivate customers to buy?
- What type of professional services sales processes and approach will work best to sell professional services to current and future customers?
- Which "go forward" strategy, approaches and tactics make the most sense in our situation, based on the findings from an assessment?
- What is the best way to transfer knowledge to the sales force so sales learns how to sell high-end solutions services offerings?

The Five-Step Professional Services Audit Process

Every services enterprise understands professional services sales are critical to ensure long-term survival and success. As an example, many companies have invested heavily in traditional sales training with mixed results because the focus has been on basic selling techniques, not tailored professional services sales training conducted by professional services business development experts familiar with how to position and sell large-scale, complex professional services and solutions.

As a result, although basic foundations in learning the "nuts and bolts" of selling are important, these programs don't often address the differences required when you sell complex solutions and service intangibles.

Dimension	Products	Services
Production	Built	<i>Performed</i>
Production Goal	Uniformity	<i>Uniqueness</i>
Scalability	Capital Intensive	<i>People Intensive</i>
Preferred Channel	Low Touch	<i>High Touch</i>
Customer Involvement	Rarely	<i>Usually</i>
Quality Control	Output to Spec	<i>Expectations to Experience</i>
Poor Quality Procedure	Recall	<i>Apologize & Aton</i>
Morale & Skill Level	Important	<i>Vital</i>

In addition, the root cause of the lack of services sales may not only be a training issue, but a sales process problem.



Consequently, sales and services professionals need to be confident they have the right professional sales process that can support the overall services sales strategy. To help address these concerns, use the following five-step process.

Step 1: Evaluate How You Stack Up Against Professional Services Sales Benchmarks

Taking a step back to review all of your existing information, specific to your business development efforts, enables you to see trends and identify historically where you have stopped growing and how existing efforts stack up against best practices.

As an example, over the past several years, Alexander Consulting has collected best practices data from over 400 organizations. Rich data like this is vital to your organization, not only for effective sales decision making, but to reflect how high-performing professional services organizations keep their strategies, processes and people aligned to their current sales reality.

**Source: The State of Professional Services II by James A. Alexander, Alexander Consulting, December 2004.*

Step 2: Interview Key Stakeholders

Collecting information from those who “touch the customer” is a critical next step in the assessment process. Through an onsite interview process with management and key people, critical sales issues surface and barriers are identified. This process also helps to focus the assessment and ensures that those who will be most affected have had an opportunity to share their ideas confidentially and constructively.

Step 3: Ride with the Sales Force on Customer Calls

Riding with your sales force on customer calls can be quite a revealing process, as you witness firsthand exactly how your sellers handle creating trust; identify services and solutions customers need, want and expect; pick up verbal and non-verbal clues; as well as position services in a manner that focuses on value, results and long-term benefits. This type of observational field process is best managed when you select several high-performing and average-performing sellers of services to ride with the on-call staff.

Of course, the goal is to provide real-time information as to how to improve the selling process and to target where sellers could most improve, but we know that your high performers are quite frequently doing great things in the field that never get noticed, nor identified. On the other hand, your average sellers may not be doing several things (asking open-ended questions, sharing services best practices and lessons learned, identifying the critical business issues of the prospect, etc.). Once these issues have been identified, helping the seller gain the skills to utilize these techniques is not that difficult.

Step 4: Conduct Focus Groups with your Services Sellers

Conducting focus groups with members of the sales team can be a very revealing process and can provide you with a better understanding of sellers’ thinking, regarding what is working or not working, related to the selling of professional services.

Ask these five questions during a seller's focus-group session:

1. When it comes to selling services and solutions, what strengths and weaknesses do you see in the process?
2. What are your ideas and recommendations for improving selling services performance?
 - List three things your company should stop doing.
 - List three things your company should start doing.
 - List three things you and your peers should stop doing.
 - List three things you and your peers should start doing.
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3. If you were the competition, how would you sell against your company?

4. What are the main reasons a customer would want to buy professional services from your organization?
5. If you had a clean sheet of paper, and no business development process, what would an ideal sales process look like?

Step 5: Don't Forget the "Voice of the Customer"

As you can see, no matter which steps you take, the customer's voice must always be heard.

Jump Start Your Process with an Audit

Conducting a services sales effectiveness audit has many benefits:

1. Future selling decisions are made based on facts, not best guesses.
2. Strengths and services sales gaps are identified, and improvements are noted and acted upon to close non-performing areas.
3. The skills, abilities and processes of those responsible for selling services are assessed to determine who has the mind-set, knowledge and ability to effectively sell services.
4. Firsthand observations while sellers are calling on customers paint a realistic picture of field realities, because findings are based on what people actually do, not what they say they do.
5. Involving those most affected by the sales process builds support for changes that will evolve as a result of the audit.
6. Real-time sales experiences are made visible in order to restructure and revitalize what is needed to improve your services sales efforts. These experiences are built into training events that sellers can practice so they improve in areas where gaps in selling exist.
7. Conducting the services sales audit before training provides valuable data to focus on the primary areas sellers need the most improvement to sell services effectively.

Training your sales force to sell services and solutions is an important step in the right direction, when skills and abilities need to be increased and you wish to shift mind-sets, build skills and increase confidence to sell services. When you conduct a services sales audit before training and integrate the findings into the training experience, you realize the best of both worlds ... a more effective services sales process ... and increased capabilities of the sellers to sell services — a winning combination!

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