Research Summary for

SOCRATIC SELLING SKILLS®

for Salesforce.com® Users

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Communispond™

About Communispond

Since opening its doors in 1969, Communispond has delivered skill-based programs in critical business areas including presenting, selling, writing, influencing, and conducting virtual meetings for more than 750,000 clients worldwide—including CEOs, board chairs, sales leaders, business professionals, media figures, candidates for high office, and other high-achievers.

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Toward a New Paradigm of Sales

The Central Problem of Modern Sales

Sales professionals and sales teams are in the midst of a revolutionary change. Gone are the days of sales heroes. Modern sales professionals are team members because collaboration and business connectivity are driving the sales process.

Accenture's *2014 report, Powering Profitable Sales Growth,* referred to data from the CSO Insights' *2014 Sales Performance Optimization Study*, which demonstrates a link between the sales process and sales effectiveness:

"Our research has shown that companies with formal or dynamic sales processes outperform their peers on a number of measures."

The measurements included annual sales revenue attainment, sales rep quota attainment, and turnover.[i,ii]

It may sound stark, but competitive pressure ensures that sales organizations that lack a formal or dynamic sales process are at risk.

In today's world, the sales process is digital. Tools to automate the sales process, conduct research, manage client relationships, track and report opportunities progress, and review sales team performance give high-performing sales organizations an edge over those that are still trying to live by outmoded paradigms. Add Customer Relationship Management (CRM) to the digital mix, and an organization will not only generate greater sales, it will also improve customer retention, which lowers the costs of sales.

It's no wonder that Gartner's latest *CRM Market Share* report shows that the worldwide CRM market grew by 13.7% – from $18 billion in 2012 to $20.4 billion in 2013, with 41% of all systems sold in 2013 being sold as Software as a Service (SaaS).[iii] Organizations everywhere are discovering the usefulness of CRM software in formalizing the sales process and improving CRM. And SaaS simplifies the adoption of CRM as well as reduces upfront costs.

According to the Gartner report, Salesforce®, a SaaS-based system, is the worldwide leader in CRM software with a 16.1% market share. Salesforce® grew 30.3% from 2012 to 2013. Salesforce® is the biggest player in the CRM space, and your organization is probably using it now. But if Salesforce® has not given you the competitive edge you have every right to expect, don't blame the software. The vision of an integrated technology and sales process is more of a promise than a reality at the moment. The two need to be integrated via the blending of technology and selling skills/process. That blending does not occur on its own. You must make it happen, carefully and deliberately. To help you, we created ***Socratic Selling Skills® for Salesforce.com® Users***, Communispond's newest high-performance selling skills program.

Your organization has invested valuable time and money implementing Salesforce® as your CRM. The investment is worth it, but only if you align it completely with your sales process. According to a CSO Insights 2012 study, CRM adoption is at less than 50%.[iv] The commonly held opinion among sales professionals is that the CRM is for the manager, not for helping

Communispond's mission with *Socratic Selling Skills® for Salesforce.com® Users* is to create a paradigm shift in the development of sales professionals—that of combining the power of Salesforce® with teaching winning sales skills to allow Salesforce® and leaders to manage with insight.

individuals increase sales results. This is a misconception, but it is a misconception with a great deal of psychology behind it. If you lack the skills to effectively use a formal sales process or the skills to use the software, you have very little incentive to use the system. This is what is holding back the sales organizations that have not embraced a formal or dynamic sales process combined with digital selling.

Sales professionals need to see the value in Salesforce® and understand how it can help drive their sales results.

Socratic Selling Skills® for Salesforce.com® Users is more than a training program, however. It is a revolutionary sales team development program. The successful integration of technology and effective selling skills are essential in today's selling ecosystem. Communispond's mission with ***Socratic Selling Skills® for Salesforce.com® Users*** is to create a paradigm shift in the development of sales professionals—that of combining the power of Salesforce® with teaching winning sales skills to allow Salesforce® users and leaders to manage with insight.

Socratic Selling Skills® for Salesforce.com® Users is completely aligned with the sales process of Salesforce®. The program is designed so that your sales team effectively follows a sales process that uses your sales stages, your terminology, your work processes, and your Salesforce®. It is as familiar to your sales professionals as their own sales funnel, even while it empowers them to shorten the sales cycle, increase sales readiness, and focus on customer needs.

Why Blend CRM and Selling Skills?

The Complexity of the Modern Sales Process

The market has seen a dramatic increase in the overall complexity of the sales process. These days, most sales situations present multiple buyers, according to research conducted by the DePaul Center for Sales Leadership in 2011-2012.[v] Even while the overall goal of the customer organization is the same, each buyer approaches the process with individual goals, and perhaps more importantly, individual motivations. The sales professional is left with the task of learning and then fulfilling multiple goals and multiple motivations, with the sale being at risk whenever one of several buyers isn't seeing progress toward his or her individual goals. The amount of data and information involved in the sales process can be enormous. The only realistic way to manage this complexity is by doing it digitally through a CRM. The success of the sale, then, depends on accurate input of data into the CRM. A well-maintained CRM record is capable of giving any member of the sales team, including the sales manager, a picture of progress toward the goals of the individual buyers, as well as a complete profile of the customer organization, the current stage of the sale, and the next step toward closing.

The skills of selling are well known and include:

- Generating Leads
- Prospecting/Working with Leads
- Qualification/Converting Leads to Accounts/Contacts
- Creating Opportunities
- Needs Analysis
- Presenting Proposal/Products/Price Quote
- Negotiation
- Review
- Close-Win/Loss
- Follow up/Next Steps

Most of these skills are useless in the absence of accurate and relatively complete information. The sales professional must be able to keep all that information in his or her mind, or be able to rely on a CRM system that does it. That is what is powering the increasing adoption of CRM systems in sales organizations. The CRM is the best possible support for the application of selling skills.

Changing the Sales Professional's Behavior

Experience shows that sales professionals are unlikely to see the value of a CRM in the sales process. They are more likely to seek opportunities to apply their selling skills than to understand their need for accurate, up-to-date information in the application of those skills. So CRM adoption rates by sales professionals are driven in most organizations by enforcement: management review, linkage to evaluations, and compensation.[vi]

There is no argument that management review, evaluations, and compensation are capable of changing behavior, but they do so in ways that are ungraceful, sometimes unpredictable, and usually impermanent. Rapid, effective, and permanent behavior change arises from individual motivation. In other words, give the sales professional a motivation to use the CRM, and it's more likely the CRM will be used and used effectively. This is one of the objectives of ***Socratic Selling Skills® for Salesforce.com® Users***.

Dun & Bradstreet[vii] analyzed their data and determined the following changes take place every 30 minutes:

- 75 business telephone numbers change or are disconnected
- 120 business addresses change
- 20 CEOs leave their jobs
- 30 new businesses open their doors
- 15 companies change their names
- 10 businesses file for bankruptcy

When sales professionals understand the fluid and changing landscape in which they are operating, they are far more likely to see the value of good, up-to-date information in sustaining the momentum of the sales process. More importantly, they are likely to see the value of that information in sustaining the momentum of their own success. When they see the role of the CRM in collecting and managing that information, they embrace it as the vehicle of sales momentum.

The Role of the Sales Process

A formal or dynamic sales process improves results at both the individual and organizational levels. In a recent study conducted by DePaul University, Center for Sales Leadership, most respondents (79%) employed a sales process. Those organizations that adhered to the process the majority of the time clearly demonstrated high levels of performance.[viii] The adoption of the sales process is proven to lead to greatly improved quota performance and an increased competitive edge for sales organizations. According to the statistics, sales professionals who adhere to the company's sales process have distinctly better sales results than their counterparts who do not follow the process.

Here's one example of this principle in action. According to a 2010 article in Inc., the CEO

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of a small firm that sells study-abroad programs learned that, for her firm, the single best predictor of lead-to-sale conversion is the response time to customer inquiries. The data said that call-backs in two minutes or less had a conversion rate four times higher than other leads. But her own company's average response time was 36 hours. When she began tracking the response time with individual sales people, sales doubled.[ix] If she hadn't had a CRM, it is unlikely that she would have ever seen the connection between response time and sale completion.

In other words, the integration of selling skills with your company's sales process helps increase the effectiveness of your sales team's customer communication, improves internal communication, and if appropriately applied, should result in improved forecast accuracy.

The Role of Technology

Sales professionals today have a broad spectrum of technology at their fingertips. Email, texting, the web, and very large public or fee-based databases all support communication and research. Laptops, tablets, and smartphones support access to those technologies. What is needed is a system to unify all these various supports, and that's provided by a CRM. Without a CRM to organize and maintain information, even the most industrious sales professional lacks direction. Moving quickly but without any notion of where to go results in wasted resources and missed sales opportunities.

The digitization of the sales process is proceeding rapidly. According to DePaul University in their *2011-2012 Sales Effectiveness Survey*,[x] the search for Business Intelligence in the prospecting process has almost entirely switched over to technology. But the prospecting process, which was dependent on depersonalized research, was low-hanging fruit. And the prospecting process is only the first step in an extended sales cycle. There remain more steps to automate, and those steps depend less on the amount of information than the accuracy and timeliness of information. CRMs are beginning to automate those processes, but many organizations stall out when it comes to changing the behavior of their sales professionals to take advantage of the CRM. That is one of the reasons we decided to build ***Socratic Selling Skills® for Salesforce.com® Users.***

Design and Methodology

Based on YOUR Salesforce® Instance

Every organization is unique in what it sells, how it sells it, and most importantly, how it uses Salesforce®. That is why Salesforce® is highly customizable and can use multiple plug-ins. Your Salesforce® instance is unique. We designed the ***Socratic Selling Skills® for Salesforce.com® Users*** course to require the use of YOUR instance of Salesforce®. This means your sales professionals will work with screens and functions from your unique sales process and will never be told, "Your screen may not look like this," which is a statement that is a well-known shortcut to skills training failure.

Learners are far more likely to learn when the content they are studying is personally relevant, so ***Socratic Selling Skills® for Salesforce.com® Users*** is based on your selling environment. The program uses your terminology, sales stages, selling process, and perhaps most importantly, your customer data. Learners are always skeptical of sample data, even if it seems to be meaningful, and it rarely is. Setting the program in your environment not only ensures better learning transfer, it also increases learner buy-in.

Instructional Design

Our intent of ***Socratic Selling Skills® for Salesforce.com® Users*** is to change the behavior of sales people. That is why the design relies heavily on social learning in both of its manifestations: collaboration and competition. Learners work in real-time, using actual data from your organization, in the same way they work in your organization. Learning transfer is actually accomplished in real time. Since the sales people are already working as they do in their own jobs, they do not need to perform the extra step of translating the training to the situation back on the job. They can also see the screens of classmates. This harnesses the social approval drive in creating learning motivation. It also takes advantage of the well-known drive among sales professionals to "win," by suggesting where they stand in relation to each other. This raises the stakes in their class work, which improves performance. It also takes advantage of elements of reciprocal determinism. Reciprocal determinism is the theory of psychologist Albert Bandura that a person's behavior both influences and is influenced by personal factors and the social environment.[xi]

Role of Sales Leadership in the Learning and Coaching Process

The sales leadership within your organization plays a critical role in the reinforcement of both the proper use of Salesforce® and the selling skills acquired in ***Socratic Selling Skills® for Salesforce.com® Users***. The course is accompanied by a mandatory one-day manager course. The objectives of the course for the managers are as follows:

- Best practices for reports
- Overview of the sales class content from ***Socratic Selling Skills® for Salesforce.com® Users***
- What goes into Salesforce.com and what does not

Why Is This Important?

The link between effective coaching and sales team performance is well known.[xii] The buy-in from sales management is critical as well. Sales managers must buy into the program and use a common language and terminology with their sales team.

Experiential Learning

Experiential learning is the process of learning through doing. Experiential learning is distinct from rote or didactic learning, in which the learner plays a comparatively passive role.[xii] It is not to be confused with the "sink or swim" strategy. Experiential learning is designed to allow learners incremental advancement to mastery, using a progression of experiences to achieve it, with built-in opportunities for reflection.

Here's how ***Socratic Selling Skills® for Salesforce.com® Users*** takes advantage of experiential learning. It fills each day with hands-on use of your organization's instance of Salesforce® and ends the day with a self-diagnosis to improve sales results, which is one of the opportunities for reflection that is necessary (but often overlooked) in experiential learning design. The course makes minimal use of slides or lectures. The focus is on learners taking action through Salesforce®.

The class is facilitated in such a way to allow for self-awareness and reflection on a constant basis. This includes a reality check in terms of the quality of the data the learner currently has in Salesforce®. The role-plays in the class are based on real scenarios from Salesforce® data and also allow for after-action review and coaching from the facilitator in the moment.

No Homework During the Course

Elite athletes know that fitness improves not during a training session, but in the recovery after the training session. The situation for mental training is very similar. Without reflection, learning is never incorporated into the learner's makeup and is largely lost without being retained. As we noted, opportunities for reflection help differentiate experiential learning from "sink or swim." So we designed a large opportunity for reflection into the course by not scheduling homework during the program. A homework-free night provides more than an opportunity for reflection. It provides an opportunity for sleep. The connection between sleep and learning has been well documented.[xiv,xv] To maximize both reflection and the opportunity for sound sleep, both of which improve learning and retention, we took the unusual decision of eliminating any planning or preparation work between Day One and Day Two.

Learning While Selling

The course focuses on production. Participants identify leads for their business, make contact with those leads, and develop value propositions for their current customers. ***Socratic Selling Skills® for Salesforce.com® Users*** may be unique in creating two days of production concurrently with two days of training.

Your team learns by conducting typical day-to-day selling activities. The concept is to bring the workplace into the classroom. Essentially, our objective is to minimize the amount of time during which the sales professional is not selling.

The theory of action learning was developed by Reg Revans in 1982. He applied the method to support organizational and business development, problem solving, and improvement[xvi]

Socratic Selling Skills® for Salesforce.com® Users incorporates elements of Revans's method, putting learners to work on real problems, focusing on learning and actually implementing solutions. It is a form of learning by doing.

Learners in the class use their own data from Salesforce® (Leads, Contacts, Accounts, and Opportunities) while they are going through the course. They research Leads, plan calls to Contacts, manage Accounts, and create Opportunities. The course is built so that Salesforce® is always front and center throughout the two-day program.

Learning Transfer[xvii] – Eliminating the Day-After Effect

Anyone who has been through a training program has experienced the Day-After Effect. In a brief, intense period, you acquire a portfolio of new and unfamiliar skills as well as the resolve to apply them. But the day you return to your desk, you find that your new skills are somewhat inapplicable to your old work processes. When it comes to applying your new skills, you don't know where to start. By the end of your first day back on the job, you have forgotten several of your new life-changing principles. In the face of urgent day-to-day pressure, you return to most of your old habits. The training becomes a memory, and becomes vaguer with each passing day. In training parlance, you have failed to successfully "transfer" the training back to your job.

The way to prevent the return to old habits is to instill in the learners new habits. ***Socratic Selling Skills® for Salesforce.com® Users*** accomplishes this by eliminating the need for learning transfer. Rather than relying on the

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learners to take the learning back to the job, this program brings the job into the classroom. Learners spend two days working under guidance with their new skills, translating the new principles directly into action. For ***Socratic Selling Skills® for Salesforce.com® Users***, the forgetting curve is transformed into a retention curve.[xviii] We accomplish this with the following key elements of the course:

- Working in your organization's data throughout the class.
- Actually selling while learning during the two days in the class.
- Using Salesforce® as a prompter for selling skills.
- Setting "Actions" in Salesforce® using activities for the day and days after training.
- Web-based reinforcement: access to Communispond Digital, including LearnTOs.
- Creating an individual development plan at the end of the course.

Game-Based Learning

Regardless of corporate culture, sales people love to win. Throughout the course, participants have the opportunity to earn "money" by successfully completing course activities, winning course-related challenges, and verbalizing their behavioral application of the material. "Coins" are awarded to participants and kept in a clear piggy bank as a visual representation of the connection between skill building, application, and sales results.

This concept is based on learning gamification. Studies over the past five years have shown that game-based learning not only increases learner engagement, but it can actually eliminate the effects of outside distractions and improve a learner's ability to retain and apply learning material to the real world.[xix,xx]

The natural competitiveness of sales professionals is also harnessed through recognition. Course completion awards are given to all participants in the form of certificates, with the winning individual's certificate indicating their "top dog" status.

The Skills of Selling

In addition to providing learners with the skills to take advantage of your organization's instance of Salesforce®, ***Socratic Selling Skills® for Salesforce.com® Users*** also incorporates several powerful selling skills. These are skills that are often overlooked by sales training programs (except for those developed by Communispond).

Socratic Dialogue

Selling is not about talking. It is about understanding the customer and listening. The customer must be the center of the process. The sales person may struggle with quota pressures, compensation plans, and inroads from competitors, but none of this has meaning to the customer, and allowing it to encroach in any way on the sales dialogue is poisonous to the sale.

We teach learners the skills of Socratic dialogue. Active listening techniques draw the customer out, and nonthreatening probes uncover new and additional information. The

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sales professional builds on the new information to probe for yet more information, building an accurate profile of the customer (and the customer's needs), and at the same time it builds a relationship with the customer. Communispond has been developing a model of selling based on listening, probing, and dialogue for more than 30 years. We call it Socratic Selling Skills®, and we have trained thousands of successful sales professionals and organizations in it. ***Socratic Selling Skills® for Salesforce.com® Users*** is steeped in Socratic Selling[xxi] and it imparts the essentials of the process to learners.

Effective Note-Taking Techniques

We conducted in-depth research into effective note taking, and in ***Socratic Selling Skills® for Salesforce.com® Users***, we include best practices and recommendations from a Harvard University paper titled "Notes on Note-Taking: Review of Research Insights for Students and Instructors."[xxii] Note taking is a critical skill for effective data entry into Salesforce®. If there are errors or missing data in the system, the information will not be valid, rendering most of the CRM valueless for planning or even observing. In addition, the system needs uniformity of style in note taking, since it is, after all, a database. Deviations in terminology and use of language can easily prevent a subsequent user from finding important relationships between data points. Teaching note-taking techniques allows us to impart this kind of uniformity. Furthermore, good note taking is also an essential skill of active listening, because it allows the listener to capture more information from the customer and helps the listener to process it at the same time.

Strong Presentation and Communication Skills

The moment of truth in a sales process is the presentation of the proposal. More than 45 years of experience has shown us that a great proposal with a poor presentation can lose out to a poor proposal with an effective presentation. Any customer with buyer's remorse will verify this. Communispond has a rich history of developing the communication and presentation skills of individuals. Since 1969, Communispond has helped over 750,000 client associates, including CEOs; board chairs; sales leaders; and sports, media, and political figures, achieve their business goals by communicating with clarity and power.

This strong history and experience was heavily utilized in the design and creation of ***Socratic Selling Skills® for Salesforce.com® Users***. Communispond also prides itself on basing its communications and presentations skills programs on sound research. The results from a survey conducted during 2006 with participants of Communispond's two-day Executive Presentation Skills® program points to 92.8% of participants feeling that they can deal with workplace communications more confidently since completing the course. Perhaps more importantly, the same research showed measurable improvement in the presentation skills of all participants.[xxiii]

Handling Objections

Socratic Selling treats customer objections not as obstacles, but as resources for furthering the sales dialogue and strengthening the relationship with the customer. We teach the learners ways to engage the customer by probing to find the origin of an objection and turning it into a mere problem to be solved. At every stage of the sales process, the same principles apply. The sales professional must listen and probe to find the motivation behind a customer's position, then use problem-solving strategies to satisfy the customer's motivation.

Content – A Brief Outline of the Program

Overview

The following course outline will provide you with a high-level overview of the course content. Overall, as described in the previous sections, ***Socratic Selling Skills® for Salesforce.com® Users*** was developed using both Communispond's experience in the learning space as well as sound research from well-known resources.

Establishing the Objectives

Learning Objectives: Participants will understand the use of Salesforce® as a sales tool and effective use of Salesforce® as a sales skill, and as a result, set their personal learning objectives for the course.

- *Introducing the Methodology*
- *Establishing the Linked Agenda*
- *Declaring Your Personal Focus*

Working with Leads

Learning Objectives: Participants will have a clear understanding of what should and should not be entered into Salesforce® as a Lead. Participants will develop new skills for identifying, prioritizing, and engaging Leads in Salesforce® to Drive Opportunities by focusing on the most valuable Leads first, and using effective introduction and engagement dialogue skills.

- *Defining Leads of Value*
- *Finding Leads*
- *Prioritizing Leads*
- *Turning Leads Into Opportunities*

Driving Opportunities

Learning Objectives: Participants will learn and practice application of Socratic Dialogue skills and learn effective preparation for sales meetings as well as documenting the results of meetings in Salesforce®.

- *Conducting Effecting Meetings*
- *Identifying Business Needs*

Presenting the Proposal

Learning Objectives: Participants will learn to create and document in Salesforce® Value Link Statements that are persuasive to their audience.

- *Analyzing the Audience*
- *Preparing the Presentation*

Closing the Opportunity

Learning Objectives: Participants will examine and experience the value of documentation in Salesforce® to improve their ability to convert Opportunities to Wins with the highest possible profitability.

- *Resolving Objections*
- *Asking for the Contract*

Committing to Win

Learning Objectives: Participants will internalize their learning and commit to individual behavior change by reviewing learning notes from the past two days, as well as Salesforce® activity reports.

- *Review of NOTES*
- *Review of Salesforce® Activities*
- *Continued Learning Opportunities*
- *Create Individual Development Plan*
- *Review Actions set in Salesforce® for the Return to the Office*

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