



7 Good Reasons to Request a Conversation with Your Customer

To date, I've never met a sales leader who didn't want to see his or her people having more meaningful conversations with customers. The problem is *not* that account managers or channel managers simply refuse to call people or that they don't know how. More often, it's that they don't know *why* they are calling! They're not sure what to talk about. And if *they* don't know, their customer/partner certainly won't!

It's embarrassing to call someone and say something like, "Hello Mr. Johnson. I just want to touch base with you." Or, "I'm just checking in." Phrases like that are pretty transparent. We all know that what we are really saying is, "Do you want to place any orders with me today?" Without a good reason to call . . . some topic of conversation that is mutually beneficial . . . our customer can easily perceive these kinds of calls as a waste of their time. And frankly, they could even be a waste of ours, too!

The natural tendency for sales managers – when they conclude that their people aren't having enough conversations with customers or partners – is to try to drive more activity, which we hope will lead to more engagement. We try to "motivate" people to reach out to their customers by establishing a new activity metric, such as "each person needs to reach 10 new prospects every day." Or "We're expecting 40 attempts to connect with a customer on the phone each day."

The problem with these kinds of activity targets is that it's just too easy to forget that the real purpose is to have a substantive conversation about something meaningful that leads somewhere, not just tally the number of dials or say "Hi" to a whole bunch of people. And from what I've seen, salespeople usually hate these kinds of initiatives anyway.

Instead of just setting an arbitrary number-of-dials-per-day goal, or even the number of connections, take the time to define a few really good reasons for talking to each customer or partner over the next quarter and set a goal to have *conversations* with every relevant customer regardless of the number of dials it takes! Focus on the outcome of conversations, such as new opportunities identified or "scheduled discovery meetings" that lead to something, not just the input of dials or sequences launched.

Topics of conversation should be very specific, timely, and highly relevant (important) to the customer/partner. Make a strong list of the 6 or 7 subjects you'd like to talk about with each customer and even write out a few words or bullet points of what an opening might sound like. Some good ones might include:

1. Learn about their plans, goals, and initiatives going forward.

This is not a new idea, but after quite a few years in this business, I still see this as one of the most regularly ignored truths of selling: "Nobody wants to buy what you sell. What they want are the business or personal outcomes they can achieve by using what you sell," (*Think Like Your Customer* – McGraw-Hill 2005). Now this was not a new idea even when I wrote about it many years ago. But we all seem to fight this inner battle to want to talk about ourselves. We feel compelled to inform our customer of our latest product offering or let them know the "latest developments at our company." Guys, we have to move past this! They don't care to hear about us. They are too busy thinking about themselves, their customers, and their competitors!

Instead, let's initiate a conversation with our customer/partner for the express purpose of learning something that helps us better serve them and anticipate their needs. Let's discover what they are already trying to accomplish and simply position what we do as a means of achieving what they already want to achieve. This could sound something like . . .

"John, we're reaching out to our best clients this week to better understand some of the initiatives, goals, and objectives you are focused on as we're heading into the new year. We're reinventing our company to better serve you and the more we know about what you guys are working on, the better we'll be able to prepare to be a valuable partner to you going forward."



2. Teach them something relevant and useful.

At first glance, this seems rather old school. Back in the day, we called it “educating” the customer. Our approach, back then, was to educate our customers about our products and capabilities. The evidence showed that if the customer understood what our product did, they’d surely see it as something they needed. There will always be some need for that. You could use your outreach to your client to talk about a new product release, how to use the new client portal, or the latest features recently added to a product they already own or may have an interest in. But let’s go one step further.

Too many of today’s presentations and proposals have the same intent we had 25 years ago. We keep trying to educate the customer about *us* and all the features and functions we can bring. Case in Point: If our website or presentation still revolves around “Who we are and what we do,” we’re stuck in the 1990’s. What’s often missing is the *why*!

If we are going to educate our customers, we need to teach them how our capabilities solve a specific business problem or deliver a specific business result. Use facts. Use case studies. Master the art of “selling in the third person” where you tell your customer how someone else like them worked with you to have a positive impact on key business metrics. The very best examples will speak to how a company moved the dial on one or more important business measures in a specific period of time, such as . . .

“Mr. Johnson, I wanted to reach out to you to share a case study (or example) of how one of our clients with similarities to you was able to improve _____ (key metric) and reduce _____ (another key metric) over the last 18 months working with us, without incurring _____ (downside or risk). I was wondering if you’d be open to hearing about this.”

PS – Have a look at my profile on LinkedIn for a couple of examples of how to articulate customer outcomes and results: <https://www.linkedin.com/in/billstinnett> And send me a “request to connect” while you are there!

3. Inform them of something they need to know.

Our customers are smart people. They’ve got their degrees, their years of experience, and they have access to the same world-wide web we do. But things change so rapidly in our modern world. No one can keep up with it all. There is great potential to become a valuable resource to our customers by making it our business to “look after” their business. If we are tuned in to what’s going on in our customers industry, in the markets they serve, and in the economy in general, we can be a conduit for some valuable information and ideas.

The key is to develop the habit of looking at the wealth of information available today through our customer’s eyes. Look for market trends and fluctuations. Pay attention to changes in laws and regulatory requirements. Observe what other companies in your customer’s industry are doing. Stay abreast of press releases issued by your customer’s customers, or their suppliers, or their competitors. Make note of anything that could represent an opportunity or a threat to them and when you see something that might be relevant and useful, that is a perfect reason (i.e., excuse) to reach out.

Important tip: Don’t just forward an article. Provide a synopsis with one or two take-aways that you think might be relevant to them. I’ve never met a customer yet who wasn’t impressed when I took a few minutes of *my* time to read something on their behalf and synthesize the key points for them. Maybe you could call and say . . .

“Randall, how are you doing? I just came across an article with an interesting bit of news about some upcoming regulatory changes that could have an effect on companies in your industry. I ran this past _____ (smart guy on our team) and he said there are really only three points that we need to be concerned about. Would you have a few minutes to discuss these with us?”

NOTE: Look closely at the language of that third sentence. Notice that from our standpoint “we” (us and our customer) are totally in this together.



4. Provide insight they may not already have.

There has been quite a lot of talk over the last few years about bringing “insight” to our relationship with our customers. I don’t know if I’ve ever seen the official definition, but it seems to me that insight suggests a deep understanding that comes from a combination of information, knowledge, and expertise that may not be readily available to everyone. The very word, in-sight, seems to suggest the ability to “see into” something.

For many of us, who don’t happen to be highly-accomplished experts or recognized thought leaders, insight comes from what we are able to learn from other sources . . . ideally, a variety of other sources like we talked about under bullet number three. But information, knowledge, and expertise only becomes insight when it is applied to answer a specific question or solve a problem before us.

Insight typically manifests once we are talking with our customer about specific issues or problems they are facing. Therefore, if we are reaching out unannounced – meaning they didn’t call us for advice – we’ll have to demonstrate insight against a story about another client (in the third person like under bullet number two) or a hypothetical situation. It will take a bit of research to make sure your approach has the best likelihood of hitting the mark. Here’s an example that could be very compelling to your customer . . .

“Hello Mr. Martz, our _____ team has recognized a rise in the issue of _____ (problem you think they may be having) as we’ve worked with several companies in your industry. We’re not certain this has become a problem for you yet, but based on recent research findings, and given the trend of _____ (market forces or other factors), we put together three key recommendations and are offering these to a few select clients who want to avoid _____ (problem in the future). Would you have an interest in hearing more about this?”

PS – This approach usually takes collaborating between sales, product marketing, maybe even research and development, etc. Expert recommendations always have more credibility when there is consensus.

5. Bring them a new “profit opportunity.”

Too often, when we do take time to think about our customer, we tend to focus on “How can we sell these guys something.” But if we want to move from sales rep to business partner, we need to think about the tangible and measurable business value that they can take to the bank. To become a better partner and start to move toward that coveted trusted advisor status, we need to come to our customer with ideas to do one or more of these things: 1) increase revenue (make more money), 2) reduce costs (spend less), or 3) better utilize assets (do more with less).

Any of these three ultimately lead to greater profitability and return on invested assets. I like to refer to these ideas as “profit opportunities” that your customer can capitalize on to improve their business performance. So, brainstorm with your team, hopefully on a regular basis, to come up with some ideas you can share with them. I honestly cannot remember a happy customer ever saying “No” to something like this . . .

“Joanne, my team and I got together early this week to talk about our partnership with you and your company. We ultimately came up with three ideas I’d like to share with you that could help you increase _____ (important business measure), drive down costs, and improve your ROI on _____. I was wondering if you’d be open to you and your VP of _____ meeting with my boss and I so we run these ideas past you.”

6. Introduce them to others on your team.

One of the most important aspects of account or partner management is to continually invest time getting to know more people within your customer’s organization. There are numerous reasons. The more people we know, the more opportunities to help them we will naturally have visibility to. We can also build a stronger relationship base to increase



our relational leverage, which in turn enables us to improve our competitive win-rate, accelerate their internal buying process, and negotiate from a stronger position.

One effective strategy for meeting more people in the client organization, is introducing people from our side who have specific knowledge and experience. Fostering a many-to-many relationship model makes us a better, more valuable partner and creates that “stickiness” that is so vital for customer retention. So, let’s get creative about how get more of our folks engaging with more of their folks. You might want to say something like this . . .

“Ms. Sanchez, I was speaking to one of our ____ experts yesterday and thought there might be value in introducing the two of you. His experience in this industry could be a tremendous resource for you. I’d love to bring him in to initiate a relationship, and maybe you’d like to invite your ____ executive to meet him, too.”

7. Invite them to something special.

I’m sure your marketing department is already sending plenty of emails inviting your customers to things. Maybe it’s an email to join a webinar or maybe to stop by our booth at the upcoming trade show. But in our role, we have to go beyond emails. We also need to come up with something more compelling than a one-way (non-interactive) product-based webinar and a visit to a tradeshow booths staffed by people who may not have the industry experience or “street cred” to turn a conversation into a deal.

As an alternative, consider holding an exclusive executive briefing featuring one or more your executives meeting one-on-one or one-on-few with certain clients. In person is best, but live video is still very powerful AND you can do more video sessions in a day or a week if you don’t have to fly multiple people in.

Sit down with your team and dream up an exclusive event, in person or on live-video, that only a few people are invited to attend. This can be as elaborate as a customer-advisory-board junket to an exotic destination or as simple as a live-video round table featuring just a few select clients hearing from one of your executive thought-leaders or a highly-respected industry expert.

As in the earlier suggestions, the subject matter has to be relevant, insightful, and as actionable as possible. You could even poll a handful of clients to see what topics might be of most interest to them. Then, once you have it defined and set up, you can make an exclusive invitation. Don’t just send out an email about it. Call unannounced or request a brief conversation where you can sell them on the value of taking part. The spirit of this call could be . . .

Hi Tom! I just wanted to take a couple of minutes to tell you about an exclusive opportunity to join a select number of other executive leaders for a briefing featuring our CEO, _____, and well-known author _____. This will be a live and interactive video conference on how forward-thinking companies are preparing to address _____ (current or future challenge) and mitigate _____ (relevant business risk) by _____ (leveraging something we offer). I was just told we have two seats left and I immediately thought of you!”

None of us needs to be reminded how difficult it is to compete for your customer’s attention in today’s business environment. Everybody is just too busy to waste any time consuming information that doesn’t help them in some way. But with a little focus and direction, and naturally a bit of preparation, it is still quite possible to initiate business conversations that are valuable to our customer. And if they are valuable to our customer, they will probably end up being valuable to us too!

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