

PROFESSIONAL DEVELOPMENT UNIT BUNDLE

COMPETENCY: Foster Client Relationship

SECTION: Develop Client Relationship

PDU VALUE: 2 PDUS

LEARNING OUTCOMES:

Why Relationships Matter - The Importance of Nurturing Relationships
Creating Meaningful Relationships with Customers Which Lead to Higher Revenues
Building Lasting Rapport - The Art of Relationship Building
Why Active Listening is an Essential Sales Tool
Is It More Important To Get Your Customers To Like You Or Trust You?
The Role of Business Development vs Sales
TEMPLATE: UNDERSTANDING SOCIAL STYLES
TEMPLATE: FUNDAMENTALS OF SELLING TOOLKIT



Why do Professional Development Unit (PDU) Bundles exist?

Whether you're maintaining your CPSA Designation, or wishing to develop your skills in sales, our PDU Bundles are made to strengthen and reinforce the skills you need to help reach new heights in your career.

Maintaining your designation gives evidence of your commitment to the principle of lifelong learning and ensures that your professional sales skills are developed as markets, customers, and innovative technologies evolve.

As the holder of a professional sales designation, you are required to meet the annual Professional Development Units (PDU) requirement. This process ensures that you are up-to-date on the most current issues and practices in sales.

WHAT YOU'LL LEARN FROM THIS PDU BUNDLE:

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SECTION 1:

THE IMPORTANCE OF DEVELOPING RELATIONSHIPS

Material:

Sales Call Planning: What to Know Before Every Sales Call

If you're in sales, one might think that you're in the business of a specific product or service. But in reality, you're in the business of people. While AI and big data are automating and transforming many aspects of the sales process, at the end of the day, people still buy from people and relationships matter. Especially in B2B.

From the moment you first connect with a lead, a relationship is being formed. If you nurture and grow that relationship into something truly authentic it can result in a long-term, mutually beneficial connection. Neglect relationship building and you'll not only be missing out on one sale, but many potentially interlinked ones in the future.

A Landscape Transformed by Tech

Whereas in the past, leads and prospects had only a basic understanding of various business solutions available, today with the internet in their pocket, they often think they know everything. This can sound daunting but what it really means is that relationships matter more than ever. Your prospects want sellers who can give them more information than just what they find online and they want to talk to a real human rather than a machine. Make it easier for prospects to get to know you through a social media presence that's more than just sell, sell, sell! Once you've gained a prospect's trust either through relationship building on social media or through traditional communication methods, they will be far more likely to buy from you.

Recurring Business Doesn't Just Happen

Product quality is obviously highly important in securing recurring business, but it's not the only factor. Yes, you offer a great product, but what happens when a new kid on the block undercuts you? If the only thing between you and your customer is the fact that your product works well, then they'll probably be easily swayed by something shiny and bright and cheaper. If you spend time nurturing the relationship, offering great customer service and continually reminding them of why your product is the best solution for them, they're much more likely to stay loyal. In fact, loyal customers who've bought from you twice before are nine times more likely to convert than first time buyers. Clearly, relationships matter and make good business sense.

Good Relationships Lead to New Relationships

A happy customer is not just likely to become a repeat customer but also an introduction to warm leads. According to Nielsen, people are four times more likely to buy when referred by a friend. If you nurture good relationships with your clients, they'll help you discover new leads and new business opportunities. And while sometimes you may have to ask for a referral, if you've truly built a great relationship with your client, they'll become a brand ambassador without prompting.

Sales is all about relationships. We know that customer experience is crucial for making the sale; according to McKinsey, 70% of buying experiences are based on how the customer feels they are being treated. Another study shows that 69% of customers leave because they don't feel you care enough about them or their business.

It's clear then that creating meaningful relationships with customers is important to nurturing them and delivering higher revenue. A personal connection with the customer allows you to build trust and situate yourself in a position where they are more likely to buy and take on board your suggestions. They'll also think twice about moving to a different company if they feel a personal connection with you, the seller.

Here's how to create meaningful relationships with customers which lead to higher revenues.

Listen and Get to Know Them

Listen to them. This is the number one rule when creating meaningful relationship - whether it be with customers, co-workers or in personal relationships. When you are asking discovery questions, be sure to subtly find out details about their life and look for common ground: Are they married? Do they have kids? Pets? Where do they vacation? What are their interests outside of work? You can also find information like this by interacting on social media platforms. Hold onto any of this info and build on commonalities each time you interact.

A word of warning: people can usually tell when you are being disingenuous, so really listen and note their responses. For example, if every time you meet you simply ask, "How are the kids?" it may come across as insincere. However, if you have remembered something from the last time or share something of your own life, you are building a real and meaningful conversation and therefore, relationship. E.g. "So Sarah must have started her new school by now; how's it going?" or "My daughter, Cailey, just started Grade 9 so we're all adapting to High School right now... How is Sarah getting on with the change?"

By getting to know them and letting them get to know you, you're creating and deepening a trusted relationship with the customer.

Share Your Story

As part of the "getting to know you" aspect, you can utilize storytelling to deepen the relationship. Listen to, or research, their business pain points and be ready to share relevant stories of how you have helped customers in similar situations overcome them with great results. Just quoting a statistic can be easily forgotten, but when it's accompanied by a real-life anecdote, it's much more likely to make an impact.

Use storytelling to sell your company and product by sharing your founder's story. Make him or her into a real person: why did they first come up with the product? What problem did they have in their own life that they created this problem to solve? In this way, you can bring your company's mission and values to life.

Make Them a Partner in the Process

Following on from this, listening to their business needs and taking their ideas into account is also vital to building a meaningful customer relationship. You are trying to provide a solution for their company, if you are able to make them feel like they are playing a part in providing this solution, they will feel proud to be a part of it.

If they give you feedback about their experience or the product, do your utmost to act on it. This can range from the seemingly smallest of things, such as honouring their preference to be contacted via phone rather than email, to the more substantial product based ones, sharing their feedback about product improvements with your team and letting them know you are taking their ideas on board. Being flexible on your offering to them based on their feedback will make them feel valued.

Keep them in the loop. Call and email them regularly; try to make in person meetings whenever you can. Show them that they, and their business, are important to you.

By making them partners in the process, they'll more likely consider their contract with you as a great deal and they'll also be more likely to stick with you and spend more money in the long term.

SECTION 2:

BUILDING LASTING RELATIONSHIPS

Material:

Building Lasting Rapport - The Art of Relationship Building

Building lasting rapport with your prospects and customers is a crucial step in achieving sales success. Not only will a good relationship help you seal the first deal with a customer, but it will also lead to recurring revenue, upsells and referrals. Relationship building is no small feat, it's not about creating one-off connections but continually nurturing and growing relationships. In fact, relationship building is an art. Read on to learn how to build a lasting rapport with your customers that keeps both your relationships and your bottom line, healthy and growing.

Be Genuine

There's a lot of things you can do to build relationships as outlined in this article, but if your motivations seem disingenuous - as if you're just out for a sale - then your efforts will have the opposite effect. If you really want to succeed in building lasting rapport then it's important that you avoid cliches and show you actually care about your product, your customer and your business. But what steps can you take to avoid coming across as insincere when you actually do care? For starters, never fall into the trap of over-promising or over-committing. This not only stinks of desperation but worse will leave your customers feeling lied to and let down. Always act with authenticity, honesty, and integrity and take ownership of your mistakes.

Know Your Customer's Personality Type

Another part of the art of relationship building includes taking time to assess your prospect's personality type. A lasting rapport will look completely different from one customer to the next. While some people are happy to discuss their home life and interests, others prefer to keep things strictly business. Yet you can still build lasting rapport in both cases just make sure you understand your customer's comfort level when starting out a new relationship. Whatever their preferences, a meaningful relationship is always built on mutual trust and respect.

Listen

Discovering your customer's personality style and earning their trust and respect requires you to pay attention. Listening skills are perhaps the most important tool in your toolbox when it comes to building lasting rapport. Through active listening, you'll be able to start discovering their needs and preferences from your very first interaction. But building lasting rapport is not a onetime thing, you need to keep listening carefully as the relationship progresses. If you do, you'll remain up to date on what's important to them, how your product is working out, and what their changing needs may be.

Think Win-Win

No relationship is ever without conflict. The key to successful negotiations and overcoming objections with customers without damaging your relationship is to think win-win. In the consultative selling approach, you are a trusted advisor trying to do your best for your client and your company - always keep this in mind. Work hard to put your customer's needs at the forefront and frame your proposals in negotiations as a way for both parties to get the best result.

Share Some of Yourself

A real relationship is a two-way street. You can't hope to come across as genuine and build lasting rapport if you close yourself off. Of course, what you reveal is up to you and your own comfort level as well as that of your customer. But if your customer shares a personal anecdote, it's a good gesture if you share one too. Sharing some of yourself also means being yourself. Don't try to be someone you're not in sales; a successful approach is not one size fits all. To build lasting rapport you'll have to find your own way with clients - you can't simply copy what you see working for another rep. If customers feel that you're being yourself, they're far more likely to trust you and want to work with you. So let your personality shine!

SECTION 3:

ACTIVE LISTENING AND BUILDING RAPPORT

Material:

Why Active Listening is an Essential Sales Tool

Is It More Important To Get Your Customers To Like You Or Trust You?

As salespeople, our number one need is to be able to understand our client or prospect's business pain. Sure, some of this can be ascertained through research but the best source is always, as they say, straight from the horse's mouth. If sales pros don't use active listening in a variety of situations - networking, events, client meetings, prospecting calls - then they are missing out on valuable intel that will help them make a sale. Or worse, poor listening skills can be the cause of big missteps or mistakes that will ruin your chances with an important customer.

Here's why active listening is an essential sales tool.

Number 1: Listening Allows You to Understand the Need

From prospecting to pitching, effective sales is all about personalisation. Yes, you know why your product is great and all the very many features it possesses and the problems it can solve. But if you don't tailor your approach to why your product or service meets your clients very unique and particular needs, your sales pitch will be dead in the water. Sometimes a prospect or client will be upfront about what they need or what their issues are, but more often than not, you'll need to do a little digging to get to the route of their business pain. Using active listening skills to decipher and decode the tidbits of information they drop into conversation can give you the killer hook that will give you the edge over your competitors. You might even be able to help them solve a problem they hadn't even realised was an issue and that kind of solution drives real customer satisfaction, loyalty and retention.

Number 2: Listening Gives You the Chance to Build a Relationship

People buy from people they like; people with whom they feel a rapport. Listening is key to building this kind of relationship with a prospect or client. To build a solid client relationship it's not JUST about business, you need to learn their personal likes and dislikes, their communication style, information about their family life and situation outside of the office. Listening actively will help you find mutual points of interest upon which you can build your relationship. By listening to and acting on their preferences, you can create a situation whereby they look forward to interacting with you and opening up their business.

Number 3: Listening Offers Chances for Meaningful Follow-up

Follow-up can be somewhat precarious at all stages of the sales process. Whether you're following-up on that first sales call, after that all-important presentation, or post sale, you need a genuine reason to connect for it to be well-received and successful. Let's say you're a week post pitch and you've heard nothing, nada. Of course you want to follow-up but if you pick up the phone with a "just checking in..." you're unlikely to be rewarded with much success. However, if you were listening carefully during previous interactions, you can have a treasure trove of real reasons to pick up the phone that the prospect will find meaningful. Perhaps it's to answer a question that they raised in the presentation and you sensed your answer wasn't fulsome enough. Or maybe you heard that XYZ was of interest to them and you've just found an interesting article on the topic that you want to share. Listening skills give you the opportunity to make sure all your follow-ups add value and the "in" you need to successfully reconnect.

Number 4: Listening Helps You Avoid Potentially Disastrous Errors

So often in sales, our tight deadlines and busy schedules mean that we have to move quickly. But if we don't pay enough attention, this can lead to serious mistakes in communication with clients. Not only does active listening give you the opportunity to learn what to say to customers and prospects, it gives you the chance to learn what NOT to say. For example, by listening carefully, you might learn that there's some serious cutbacks in the pipeline for your client, so now is not the time to approach them with an upsell. Or it might be as small a thing as noticing that a prospect is put off by a certain type of joke or way of speaking, so you can avoid them so as not to cause offense. Maintaining good relationships with clients is important and active listening is an essential way to keep these relationships strong.

Sales is not without its share of wives tales or empty sayings, passed down from one generation of sales people to the next. Some are considered universal, despite the fact that it has been a long time since they related to anything in specific to selling consistently and successfully. But they sound good, and you generally get “bonus” points for saying them in the right discussion, on social media or sales seminars. In most instances, these are completely wrong, or off the mark, but go undisputed because they have taken cultural roots in the sales mythology.

One of these is the notion that “people buy from people they like”, which is not true at all. We have all bought from people we did not necessarily like or would want to spend time with outside the business at hand. What people really mean is that “people buy from people they trust”, but many sellers have difficulty building trust, and have a much easier time “getting liked”. Some are good at being likeable, others go to the most common denominator and resort to buying adoration. One fellow I was discussing the issue with this week, offered this when I asked him how his team achieves being liked: “a couple reps taking prospects to the Giants Rockies game on Thursday couple reps taking prospects to the Giants Rockies game on Thursday”. Gee, what do you do in non-Major League towns?

This is no different than the reps that say, “I’ll bring the coffee, how do you take it”, rather than dealing directly with objections or giving a sound reason to a buyer for meeting.

Sure it is effective, it perhaps gave you an illusion of being liked, until someone more “likeable” comes along. You don’t know how many times I speak to reps who lost existing accounts who say, “I thought he liked me”; sure he did till someone more likeable came along.

Instead, if you know how to grow, build, and maintain trust, you will gain a more solid foundation for a business relationship. And that is what we are dealing with a business relationship, if you are trustworthy in the way you do business, in how you help them reach their objectives, you will be on a much safer ground than if you pretend they like you. There are people we all trust that may not be at the top of our “like” list; but they are at the very top of the reliability list, capability list, straight intentions list, and so on.

Many people, outside of business development and sales, often consider that these roles are synonymous; just different ways of describing the same thing. And while it's true that both roles exist to grow a business, they are not the same at all.

In fact, what it comes down to is the division of the sales process. In companies where there are both business development reps and sales reps, each is responsible for clearly defined aspects of the sales funnel. Here we'll describe the role of business development vs sales.

The Role of Business Development

The role of business development is to expand an organisation's reach. In terms of a sales team, a business development representative would be tasked with such activities as researching, prospecting, and qualifying leads. Business development reps will make customer calls, but their role is more about information gathering: what are the prospect's business needs and pain needs? How can your company provide a solution? Once a lead has been qualified, a business development rep would then pass them onto sales where it's the rep's task to further develop and close. Because they are not responsible for closing deals, unlike sales reps, business development pros do not have quotas.

The reason why some companies now remove this part of the process from their sales reps is that it is increasingly difficult to reach a buyer. It's a labour intensive job that requires a great deal of time and it doesn't make sense for all this to fall on the shoulders of a sales rep with a quota to meet. Having team members whose sole focus is to qualify leads creates efficiencies in the sales process. Some companies may also use the business development role as a training ground for quota-carrying reps, making them first have to prove their abilities in researching, prospecting and qualifying before they move onto deeper client relationship management.

The Role of Sales

Conversely, the role of sales is to close deals... and this is no easy feat. After receiving a qualified lead from a business development rep, the sales team are responsible for actually making the sale: hosting demos, presenting pitches, handling objections, drafting contracts and negotiating the best possible deal.

Some companies, especially those of smaller size, may have their sales reps also complete the functions of a business development rep. However, when the two roles are split, it gives sales greater capacity to build relationships with prospects and clients and close more deals. Time is money; the more qualified a lead when it is passed to sales, the less time and money wasted on dead-ends.

As mentioned above, a large part of the role of business development is to gather intel. While it's still a big part of a sales rep's role to continue this information gathering, there is a bigger emphasis on client relationships and strategic account management: building rapport and trust; convincing the prospect of your product's suitability to solve their business pain and successful negotiation strategies.

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SECTION 4:

UNDERSTANDING SOCIAL STYLES

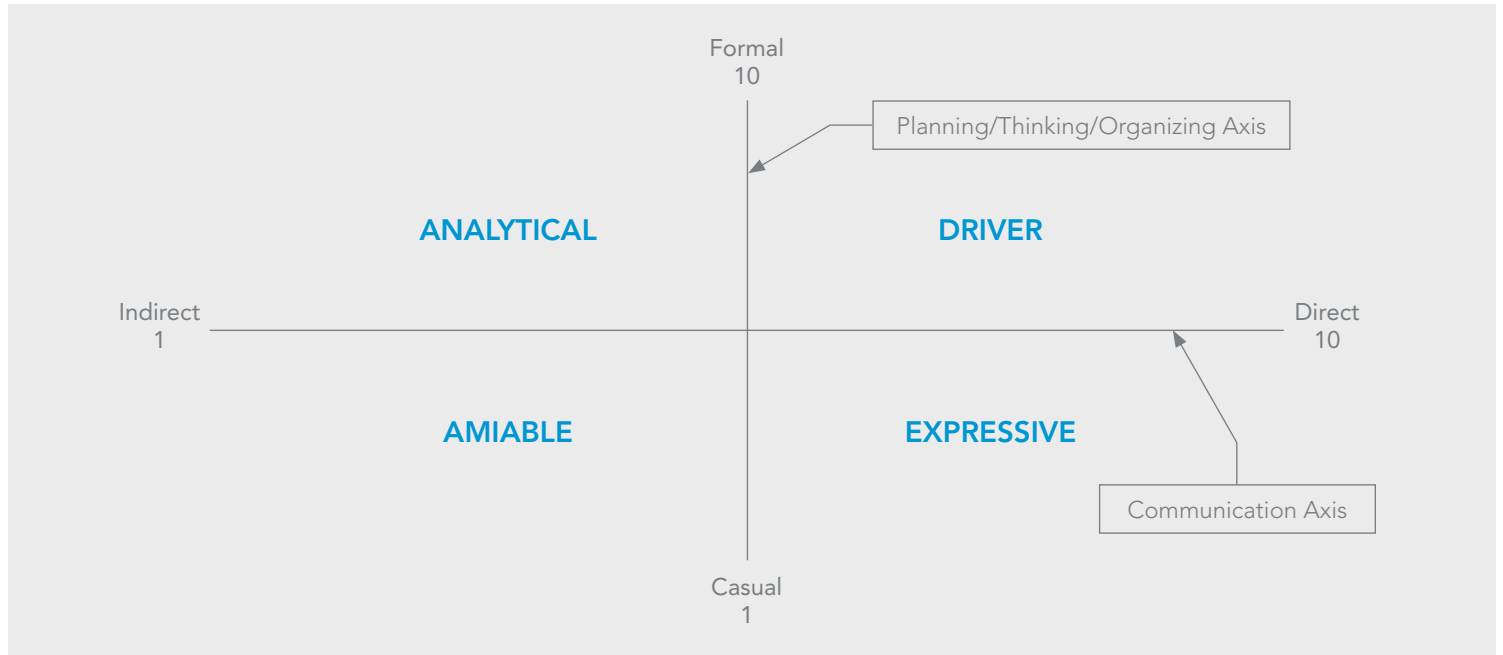
Material:

Template: Understanding Social Styles Template:

Fundamentals of Selling Toolkit

PURPOSE: This tool helps you to identify different personality styles to plan your strategy, and helps you to adapt your communication with the client to secure the sale.

The Theory of Personality Styles: A graphic matrix of two personality dimensions – Planning/Thinking/Organizing and Communication



Matrix adapted from "The Theory of Social Styles," *Personal Styles and Effective Performance: Making Your Style Work for You*, By David Merrill and Roger Reid, Chilton (1981).

PERSONALITY STYLE	List the strategies that you would use to prepare for the different client personality style. See below if you are not familiar with the characteristics.	
	PREPARING FOR YOUR MEETING	DURING THE CALL
Driver		
Expressive		
Amiable		
Analytical		

<p>ANALYTICAL</p> <p>Characteristics:</p> <ul style="list-style-type: none"> • Cautious, efficient, meticulous • Well-prepared, good planner • Evaluates/analyses with logic • Craves the finer details • Likes to see things in writing • Needs time to evaluate/analyse • Willing to make decisions as a team <p>Typical Focus:</p> <ul style="list-style-type: none"> • Determining the solution that best meets the technical requirements <p>Needs:</p> <ul style="list-style-type: none"> • Maximum information • No time pressure • Quality • Autonomy for analysis <p>Deal With Them:</p> <ul style="list-style-type: none"> • Give lots of information and documentation • Focus on facts and details • Use logical analysis (i.e. Pros/Cons lists, etc.) • Be very specific; not vague • Help them to conduct analysis; give time/space for analysis and evaluation 	<p>DRIVER</p> <p>Characteristics:</p> <ul style="list-style-type: none"> • Demanding, impatient, enterprising • Result and/or task oriented • Self-confident, optimistic, positive • Entrepreneurial and profit-oriented • Makes decisions quickly, and with autonomy • Persuasive and audacious • Can give / take back trust <p>Typical Focus:</p> <ul style="list-style-type: none"> • Determining the best “business decision”, quickly <p>Needs:</p> <ul style="list-style-type: none"> • Details, but in summary format • To win, control, and succeed • Challenges <p>Deal With Them:</p> <ul style="list-style-type: none"> • Quickly and efficiently • Focus on facts and details • Use logical analysis (i.e. Pros/Cons lists, etc.) • Be very specific; not vague • Be concise; use key points • Focus on benefits, especially financial benefits • Allow them to control the conversation
<p>AIMIABLE</p> <p>Characteristics:</p> <ul style="list-style-type: none"> • Patient and laid-back • Modest and considerate • Friendly, warm, and cares for others • Intuitive and emotional • Follows instinct, but doesn’t force it • Consults with others for decisions • Likes feeling useful <p>Typical Focus:</p> <ul style="list-style-type: none"> • Ensuring everyone is happy with the eventual decision/outcome <p>Needs:</p> <ul style="list-style-type: none"> • Lots of attention • No stress and no pressure; calmness • To involve others in the process • Time to allow the best decision to emerge <p>Deal With Them:</p> <ul style="list-style-type: none"> • Spend time/effort on rapport; build trust • Offer to work as a team; no pressure; go slowly • Ask about their instincts • Focus on what the decision makers will “want” 	<p>EXPRESSIVE</p> <p>Characteristics:</p> <ul style="list-style-type: none"> • Emotional, outgoing, friendly • Prefers change and variety; innovative/creative • Social; prefers teams • Intuitive and instinctive; doesn’t like details • Impatient; decides very quickly • Self-confident, passionate, and influential <p>Typical Focus:</p> <ul style="list-style-type: none"> • Determining the best decision based on experience and intuition, quickly <p>Needs:</p> <ul style="list-style-type: none"> • To control the decisions • Public recognition and leadership • To involve others • No details; lots of summaries <p>Deal With Them:</p> <ul style="list-style-type: none"> • Build rapport quickly; enthusiastic and informal • Simple explanations; few details • Encourage trials/experiments; creative solutions • Focus on benefits to all stakeholders; even non-financial

The Rapport Reference Chart above was adopted from multiple sources, including *Communicating With Impact*, © Corpovision 2000.

Developing Client Relationships

Becoming a Relationship Building Expert

Instructions: Now that you have completed reading the articles, apply your knowledge and expertise by answering the following questions.

1. According to McKinsey, 70% of buying experiences are based on how the customer feels they are being treated. Another study shows that 69% of customers leave because they don't feel you care enough about them or their business. Which of the four is not an example of how to create a meaningful relationship?
 - a. Listen and get to know them
 - b. Share your story
 - c. Make them a partner in the process
 - d. Make them pay before your process begins

2. According to Nielsen, people are _____ times more likely to buy when referred by a friend. If you nurture good relationships with your clients, they'll help you discover new leads and new business opportunities.
 - a. Three
 - b. Four
 - c. Two
 - d. Ten

3. List and define the top 4 strategies that can help you build a lasting rapport with your customers that keeps both your relationships and your bottom line, healthy and growing. How could you use each?

Rapport Building Strategy	Example of How I Use it
1.	
2.	
3.	
4.	

Which of the four are you likely to NOT use? What steps can you take to improve your skills in this area?

Answer Key:

#1. d, #2.b, #3.Be genuine, Know your Customer's personality type, Listen, Think Win-Win, Share some of yourself.

- If sales pros don't use active listening in a variety of situations - networking, events, client meetings, prospecting calls - then they are missing out on valuable intel that will help them make a sales. Provide the top 4 reasons active listening is an essential sales tool and explain why.

Importance of Active Listening	Why is it Important?
1.	
2.	
3.	
4.	

Do you need to improve on an area of active listening? If so, which one? How do you plan on improving?

Area that I need to work on: _____

Steps to improve:

Congratulations,
You've just earned 2
PDU's!
Track your PDUs [here.](#)