
I N T R O D U C T I O N

*“You’re gonna need a bigger boat.”*¹

You might recognize that line from the movie, *Jaws*, in which a great white shark terrorizes beachgoers at the seaside community of Amity Island. While out in the newly hired shark hunter’s boat, the town’s police chief takes in the enormity of the beast up close and utters that now-famous understatement.

When facing extraordinary challenges, we often find our existing remedies inadequate. So we use all our resources and best ideas until we figure out how to overcome the latest obstacles. In other words, we find a bigger boat.

If there ever was a time when professional services sellers needed new strategies and tools (a bigger, *better* boat), this is it. In the not-too-distant past, you *knew* what to do. Before you met a client for the first time, you would run through a familiar checklist of everything you needed to consider. You would think through your service offering and brush up on your rapport builders. Then you would listen to what the client wanted, offer a solution, handle objections, and close the sale. For the most part, that approach used to work. But some not-so-subtle changes have crept into the services sales process, short-circuiting the power of this routine approach.

For starters, clients began asking tougher questions and demanding more precise answers, including exactly how sellers would deliver their services and who would do the work. No longer satisfied with resumes to make their assessments, clients insisted on handpicking the people they wanted. In some cases, buyers asked sellers to create working prototypes of their proposed solution, offer previously completed work product as examples, and participate in mock workshops to demonstrate that they really knew what they were doing.

Complicating matters, the client might hand over the purchase of the service to a procurement manager for negotiation, creating a buffer between the seller and the real buyer. Procurement executives, always anxious to cut the best deals possible, tend to emphasize price, terms, and conditions instead of the substance of proposals.

Clients have become impatient with the passive role of sitting back and waiting for a sales proposal from the supposed expert, instead demanding a hand in the process from the beginning. And they insist that services providers customize proposals and presentations down to the last detail. Generic claims from sellers, such as “Clients are our first priority,” have ended up as roadkill on the highway to success.

In short, clients have grown weary of constantly keeping their guard up against false sincerity, artificial deadlines, and programmed strategies that salespeople were trained to use. If you need evidence of this fact, just reflect on how hard it can be to get an appointment with anyone other than an intermediary, even if you have something a client needs. If you ask 20 prospective buyers if they’d rather spend the afternoon with a dentist or a salesperson, most will dash to the dentist’s chair.

Sales executives did hear these messages from buyers and responded with what some salespeople still call “customer-focused” sales strategies. Supposedly, these put the client’s interests, not the seller’s desire for a commission, at the center of the sales process. But, to many clients, these strategies looked like the same old seller-centric ones in a new guise.

The predictable outcome is that the client’s perspective about service providers has shifted from “We trust you” to “Prove it.” This is understandable. After years of listening to sales pitches, clients realize that relying solely on sellers’ promises is no longer enough to arrive at a decision. They want more certainty about potential results and risks before they commit their resources. Asking for proof of sellers’ assertions is a logical place to start. What clients are really saying is that they want another way to buy services.

For sellers, this transformation means that the services sale has taken on all the characteristics of a complex project, not just a sales pitch. The salesperson, in effect, has become a project manager—solving clients’ real problems, persuasively advocating for change, and managing the complex sales process. Salespeople are discovering that they not only have to develop superb selling skills, but competence in consultative abilities such as problem analysis, solution development, project management, and change management, to name a few.

Why Services Selling Must Change

One problem for services sellers who try to respond to these buyer demands is the outmoded definition of *selling*, which has its roots in the history of the product sale. For a business that sells bookcases, the buyer's need is clear—a place for storing books. What drives that sale is the features, benefits, and price of the bookcases. But if clients are struggling with how to improve employee retention, cut shipping costs, or accelerate business growth, for example, what clients say they want may not be what they really need.

And, unlike those selling products, services sellers can't afford to sit back in a showroom, waiting for a buyer to arrive with a ready-made need and a credit card. Today's services seller must be active in the market, offering ideas and solutions that *generate* client demand, and then they must be able to put together a winning sales strategy to satisfy that demand. What sets service providers apart from other sellers is that they are first and foremost *idea merchants*.

Before they can sell anything, they must sway clients with their ideas for change. Only then can they attempt to sell their services. This is where traditional sales advice falls short. Without recognition of their role as purveyors of ideas, sellers get trapped in common mistakes, such as trying to close the sale prematurely or preparing sales proposals before the client's problem is certain. As a result, if they win the sale at all, sometimes they solve the real problem; but it's equally possible that they end up treating symptoms and nothing really changes for their clients.

What Is a Professional Service?

A professional service is the performance of tasks designed to address a client's business issue(s) or need(s)—for a fee. A services sale is most often an individualized offering, such as an advertising campaign or a new business strategy. It usually requires more than a single sales call to close and, often, an extended time to deliver.

If you sell or deliver professional services, you know how much one client's buying process can differ from another's. You could find that one client wants a traditional dog and pony show for the sales presentation. Another client may want to see a prototype of your solution. Sometimes, clients want the process to have the precision of a symphony; other

situations call for improvisation. Your sales process must accommodate either approach, or both. Instead of just listening to what you have to say, today's clients may dictate the buying process, or at least they're likely to want a hand in designing it.

But the client's participation in the sales process doesn't stop there. Today's clients often want to coinvent the solutions to their problem with you during the sales process. More and more, clients insist on defining, along with you, every aspect of the service. It is less common for clients to agree to iron out unresolved issues during the delivery of the service. This means that clients are stepping up to take ownership of the solutions they create with you.

These trends, the buyer-designed sales process, coinvention of services, and client ownership of the solution, impact every aspect of the services sale. If nothing else, these trends should tell you that you need new rules for selling professional services. More flexible strategies and tactics will leave the cookie-cutter sales processes in the dust. The intention of this book is to help you reach more clients and win profitable work—without losing your sanity.

The New Environment for Selling Services	
Then	Now
Sellers	Idea merchants
Help us	Show us
Offer a service	Coinvent a solution
Sell	Facilitate buying
Manage the sale	Manage change
Qualifications	Results
Few decision makers	Distributed decision making
Good work	What else can you do?
Assert credentials	Prove value
Sales techniques	Tell a story

What You'll Get

Whether your company sells business services, legal advice, outsourcing solutions, or management consulting, this book is for you. And, if you offer

a professional service that is bundled with a product (or sold separately), you, too, will benefit from the concepts outlined here. In these pages, you'll find strategies and tools for winning the complex services sale, whether you are a sales force of one or part of a team. You won't find a monolithic sales process, but a set of consultative sales tools to help you identify the right opportunities and land the most profitable work—no matter what services you sell or who you sell them to. For those of you who already have a sales methodology, the principles in this book offer a powerful addition to your preexisting sales process.

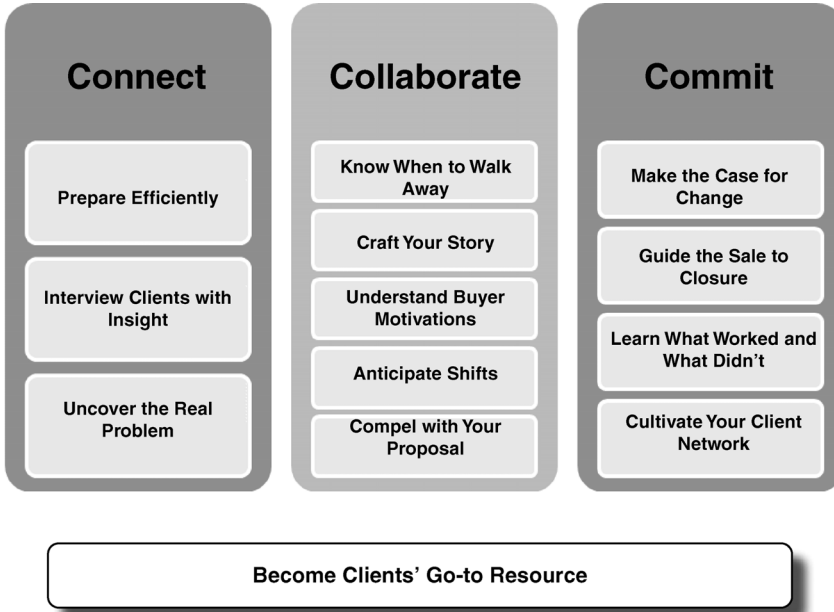
Three essential concepts are the backbone of this book: First, in today's market every sales situation, whatever its size, evolves in predictable ways, and your approach to pursuing the sale must be mindful of this fact. Second, you may offer the same services to every client, but the way those clients buy and the issues you must address will be different every time. That means you must build a winning sales approach dynamically, as each sale unfolds. And finally, the professional services sale is a consultative process, which demands that sellers develop a broader perspective on the client's business than the sale right in front of them.

To help you respond to these realities and buying trends, the book offers a multipart framework, called "The Three Cs of Winning the Professional Services Sale: Connect, Collaborate, and Commit." This framework is *not* a rigid, linear progression of sales activities, but a way to organize a client-specific strategy that leads to a profitable sale.

The Three Cs framework stresses that the professional services sale is a consultative endeavor in which the seller, in collaboration with the client, uses the tools of the business adviser to understand the real issue facing the client. Then, with a clear view of the challenge, the seller and buyer coinvent a range of solutions that reflect the choices the client can make to address the issue. You differentiate those choices by factors such as expected value, complexity to implement, risk, and cost.

Part 1, "Connect," which helps you launch the sales process, begins with a rundown on the competitive realities confronting services sellers. Then I'll show you how to get off to a fast start with every sales opportunity through targeted preparation, efficient data collection, and insightful analysis of the client's issue. The emphasis throughout Connect is on the need to establish your unquestioned competence as the foundation for productive client relationships.

The Three Cs of Winning the Professional Services Sale



Part 2, “Collaborate,” lays out how to guide the client from the definition of the problem to a workable sales proposal, if that’s the direction you and the buyer agree on. The underlying idea here is that your eventual profit—and your level of stress—are often determined during this stage of the sale. This part of the Three Cs provides a systematic way to make the (sometimes) tough decision to pursue an opportunity or leave it for someone else. It also offers advice on understanding buyers’ motivations, crafting a winning sales strategy, managing inevitable surprises that crop up during the sales process, and designing the perfect sales proposal.

Among other things, Part 3, “Commit,” shows you how to tell the story about clients’ issues in a way that leads them to buy from you. Given the complexity of professional services offers, many sellers also assume the role of negotiator. If that’s you, then you’ll be able to use the advice on how to close a profitable sale while strengthening the client relationship.

No matter whether you win or lose a sale, you should use the wealth of intelligence you gain from the experience to refine your subsequent attempts to sell. To that end, the section about Commit also includes a way to look back at the sales process with clients to learn what worked and

what didn't. This part of the framework also covers how to kick off your client projects and cultivate your network of client relationships. You'll find tips for building resilient client relationships that will support you on your current project and on future ones, too.

The Three Cs framework shows you how to become the go-to resource for clients, which should be your goal. You'll be the first one who comes to mind when your clients need help because of the strength of your ideas and the depth of your relationships.

The final section of the book, "Challenges," offers a practical guide for becoming a top-performing seller. The concept here, which I call the Seven by Seven Seller, outlines the roles and skills you must master to consistently land the work you really want.

And if you're a sales manager or executive, look for advice on how to identify potential sellers with just the right mix of talent and skills to become your next rainmaker. You'll also find suggestions for customizing professional development programs to cultivate the traits you want in all your salespeople.

Throughout the book, dozens of sidebars offer tips to make every part of the sales process more positive for your buyers and more productive for you. I've also included "Sanity Checks" along the way to suggest ideas for easing the pressures of selling and to challenge conventional assumptions about how to win the professional services sale.

The examples and stories in the book illustrate why some things work and others do not. These are based on real experiences, but I've changed the names and other details about the people involved to protect their confidences.

For simplicity, I use the term *client* or *buyer* throughout the book to mean either prospective or existing customer or client. I also use the terms *seller* and *salesperson* interchangeably to indicate the individual(s) working on the sales opportunity, whether they are business development professionals or service providers who have responsibility to both sell *and* deliver their services.

Those who offer professional services to clients are a diverse group, and each type of provider has its own terminology and jargon. Some of you may refer to your work with clients as *cases*, *engagements*, *initiatives*, or *projects*, and I use these terms interchangeably.

Just to be clear, this isn't a theoretical book on sales. For more than two decades, I've sold and delivered professional services, from one-week assessments handled by a single person to multiyear initiatives staffed

by hundreds of people—and everything in between. Most of those sales were purely for services; but some were bundled sales, meaning they included a product and service component. I do not attempt to offer advice on selling products exclusively. Most books that attempt to straddle the worlds of selling products *and* services end up treating neither subject with the care it deserves.

Whether your title is business development executive, account manager, salesperson, consultant, or sales manager, you will find something of value in this book. The successful salesperson, both now and in the future, will be a consultant, project manager, problem solver, change agent, and seller all rolled into one. You'll consistently win the professional services sale if you approach each opportunity with two ideas in mind. First, your interests and those of your clients are inseparable. Your challenge is to help clients see that you genuinely believe that. Second, top sellers consistently land the most profitable work by realizing that drawing clients to them through the power of ideas is far more effective than chasing buyers with outmoded sales tactics. This book will help you do all of that and more.

Think of it as a bigger boat.

**WINNING
THE PROFESSIONAL
SERVICES
SALE**

