

Chris Sample







## Welcome

Dear Chris,

This Lumina Sales Portrait is designed to give you feedback on the way you work with core sales processes and to help you to recognise your strengths and ways to develop them further.

These six core sales stages are strongly linked to successful sales and sales relationships. Everyone has their own way of approaching and mastering these processes and this Portrait will give you another perspective on your own style.

A handwritten signature in black ink, appearing to read 'Stewart Desson'.

**Stewart Desson**  
CEO Lumina Learning

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## Glossary

This section is intended to explain some of the terminology used in the Lumina Sales Portrait. While we put a lot of work into structuring the information in a way that is easy to read, we understand that some supporting definitions might help you understand the content better.

### **The Six Sales Stages**

The six stages combine to form the Lumina Sales cycle. Each stage is underpinned by four processes that suggest methods to deliver effective results at each stage of the cycle.

### **The 24 Sales Qualities**

These qualities reflect your natural selling style and are underpinned by your personal traits.

### **Strengths**

Qualities that aid you in the sales cycle

### **Possible Shortcomings**

Qualities which may hinder your progress within a sales cycle; these qualities can be developed so that you can harness them more effectively

### **Overextended**

Qualities which have been overplayed to the extent that they can negatively impact your sales cycle; these can be tempered to control their effects

### **Comes naturally**

Natural ability within this area

### **Doesn't come naturally**

These areas require more effort to utilise.

### **Inclined to overextend**

The extent to which you have a tendency to overextend within this area

### **Not inclined to overextend**

You are less inclined to overextend in this area.

If you are uncertain about the interpretation of the information in your Lumina Sales Portrait, please contact your Lumina Learning Practitioner.

# The Six Stages in the Sales Cycle

## Research & Acquire Market Knowledge

Effective Qualities  
 Think outside the box  
 Competitor Savvy  
 Gather Data  
 Emergent Research



Overextended Qualities  
 Ungrounded Research  
 'I know best' Research  
 Analysis Paralysis  
 Unbounded Inquiry

## Prospect & Engage Clients

Effective Qualities  
 Proactive Networking  
 Purposeful Argumentation  
 Methodical Prospecting  
 Engage with Empathy



Overextended Qualities  
 Random Networking  
 Pushy & Blunt  
 Process Driven  
 Gives too much

## Understand Needs

Effective Qualities  
 Stimulating Ideas  
 Voice of Reason  
 Discerning Assessment  
 Reflective Understanding



Overextended Qualities  
 Creative Overload  
 Critical  
 Aloof  
 Passive

## Recommend Solutions

Effective Qualities  
 Enthusiasing  
 Convincing  
 Detailed Proposal  
 Co-creating



Overextended Qualities  
 Overwhelming  
 Pressuring  
 Lost in the detail  
 People Pleasing

## Get Commitment

Effective Qualities  
 Intuitive Close  
 Decisive Close  
 Due Diligence  
 Collaborative Close



Overextended Qualities  
 Chaotic Close  
 Forced Close  
 Tentative Close  
 Conceding Close

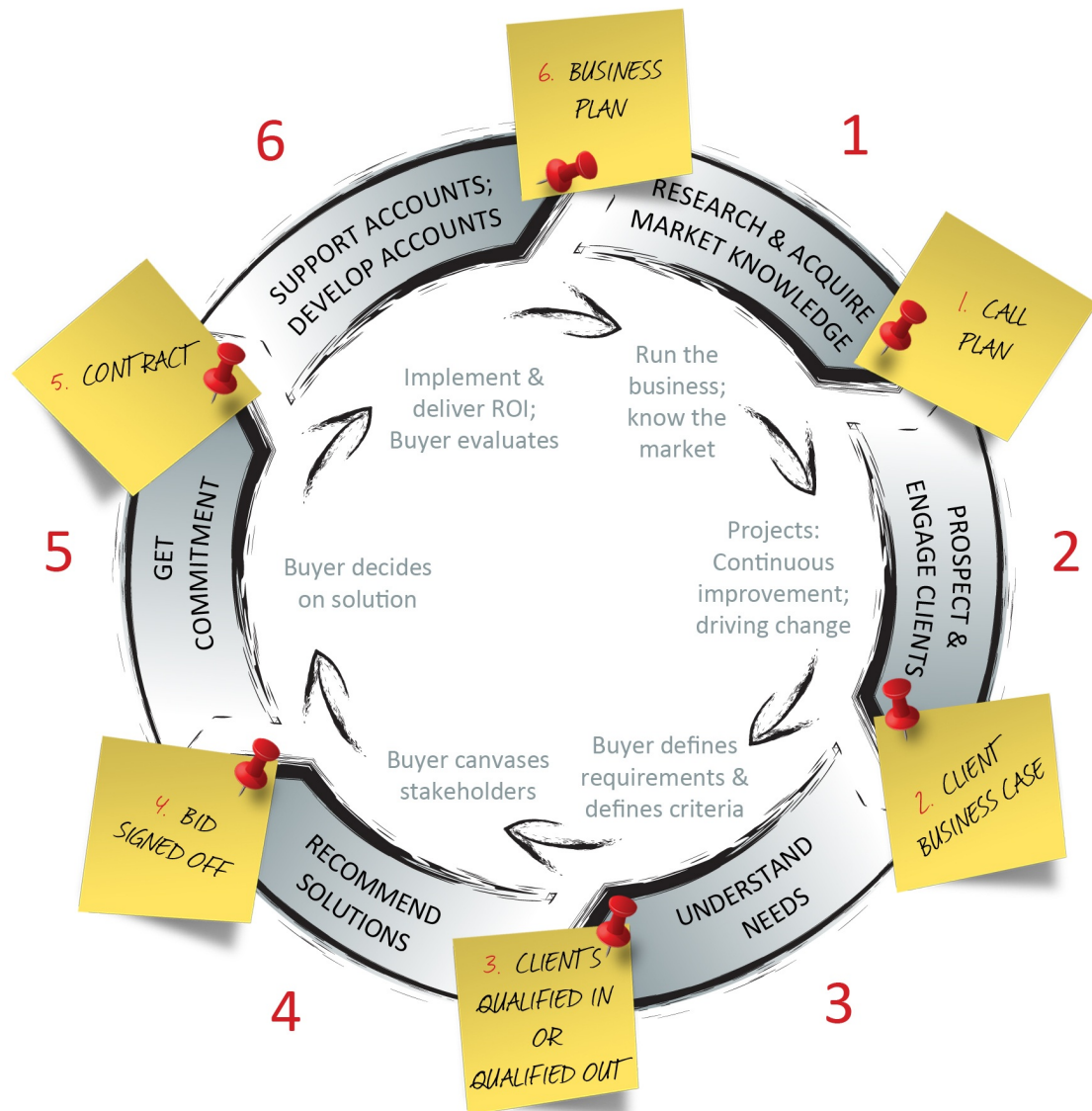
## Support Accounts; Develop Accounts

Effective Qualities  
 Galvanise Relationships  
 Drive to Deliver  
 Rigorous Execution  
 Accommodating Service



Overextended Qualities  
 Erratic Follow-through  
 Impersonal Follow-through  
 Bureaucratic Follow-through  
 Acquiescing Follow-through

## The Six Stages of the Buyers' Cycle mapped onto the Sales Cycle



GREY RIM - Six stages of the 'Sales Cycle'

INNER SIX SEGMENTS - Six stages of the corresponding 'Buyers' Cycle'

POST-ITS - Six key outputs - one for each stage of the Sales Cycle

# The Six Stages and 24 Processes of the Sales Cycle



## Research & Acquire Market Knowledge

Know the Market;  
Know the Competition

Identify Key Clients

Develop Entry Strategy

Build Call Plan



## Prospect & Engage Clients

Access & Engage Stakeholders

Create Value Hypotheses

Purposeful Argumentation to Shape Business Case

Dialogue with Clients on the Business Case



## Understand Needs

Qualify Client In; Qualify Client Out

Understand Client Decision Process & Buying Criteria

Go? No Go? Assess Probability of Making the Sale

Internally - Secure Funding to Design a Solution



## Recommend Solutions

Co-Create a Client-Centered Solution - Define Deal

"Know thy self, Know thy enemy" Dispatch Competitors

First Presentation of Proposal to Client

Internally - Secure Funding to Make a Bid



## Get Commitment

Document "Best & Final Offer"

Final Presentation of Proposal to Client

Negotiate with Client

Due Diligence & Signing Client Contract



## Support Accounts; Develop Accounts

Shift from Winning Sale to Service Delivery

New Order Process & Sales Tracking

Create Account Business Plan & Supporting Processes

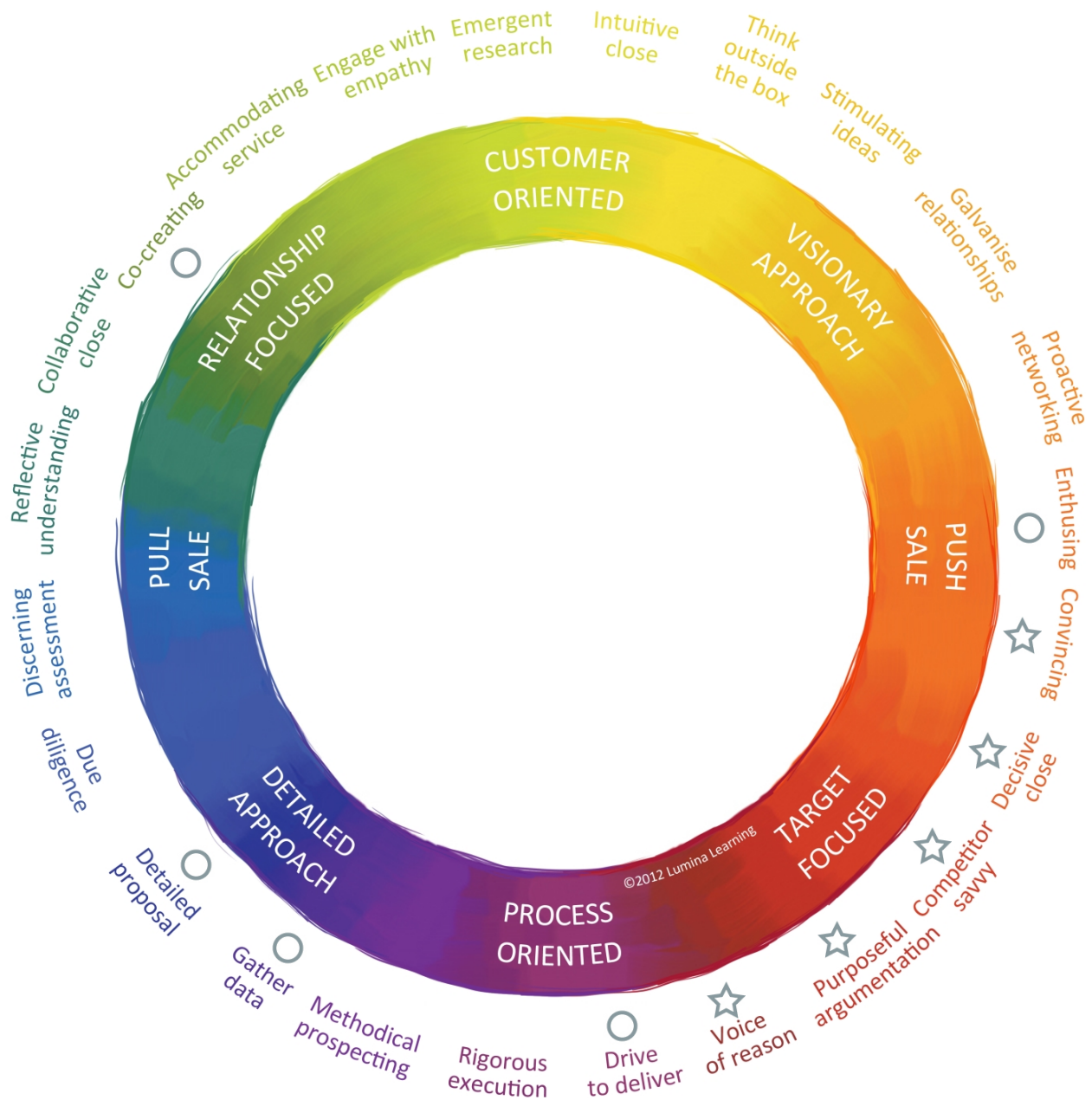
Seek Additional Sales Opportunities

## Exploring Your 24 Sales Qualities

Below is your personalised Sales qualities tag cloud. The bigger the font, the more of the Sales quality you are likely to possess.

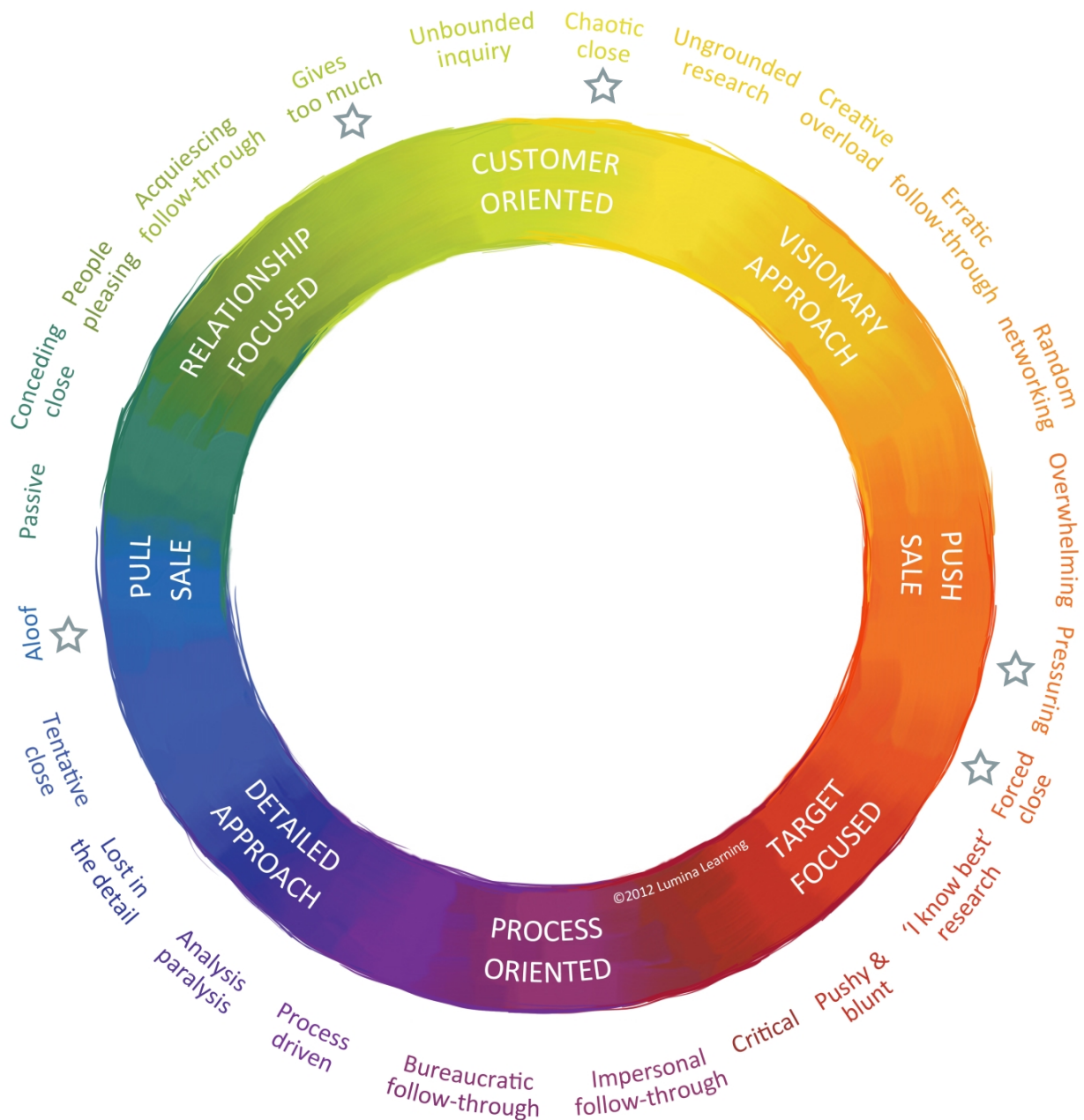


## Your 24 Sales Qualities around the Sales Mandala



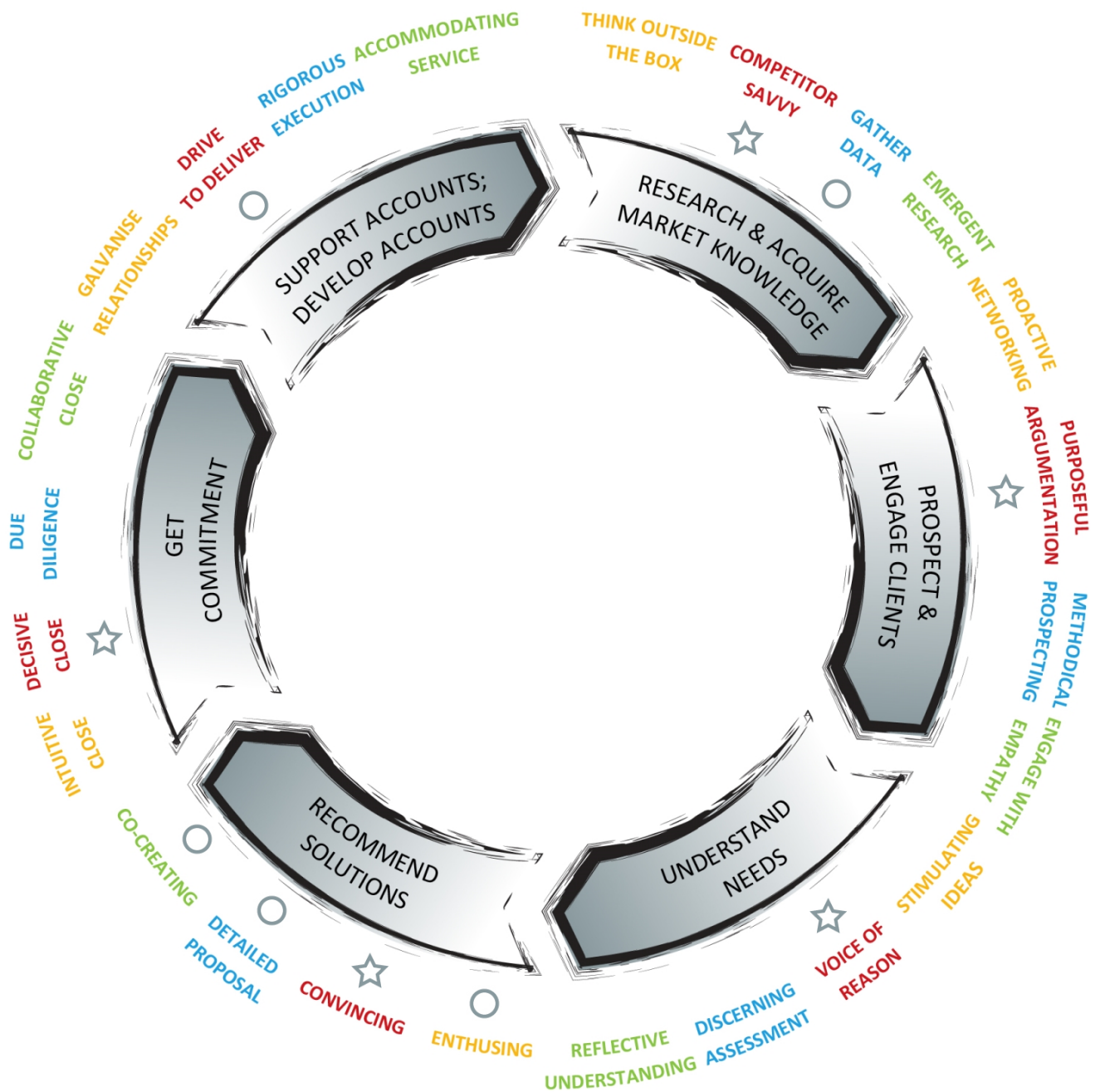
- ☆ - These are your 'top five' Sales qualities that come most naturally to you.
- - These are your 'bottom five' Sales qualities; they come to you less naturally.

## Your 24 Overextended Sales Qualities around the Sales Mandala



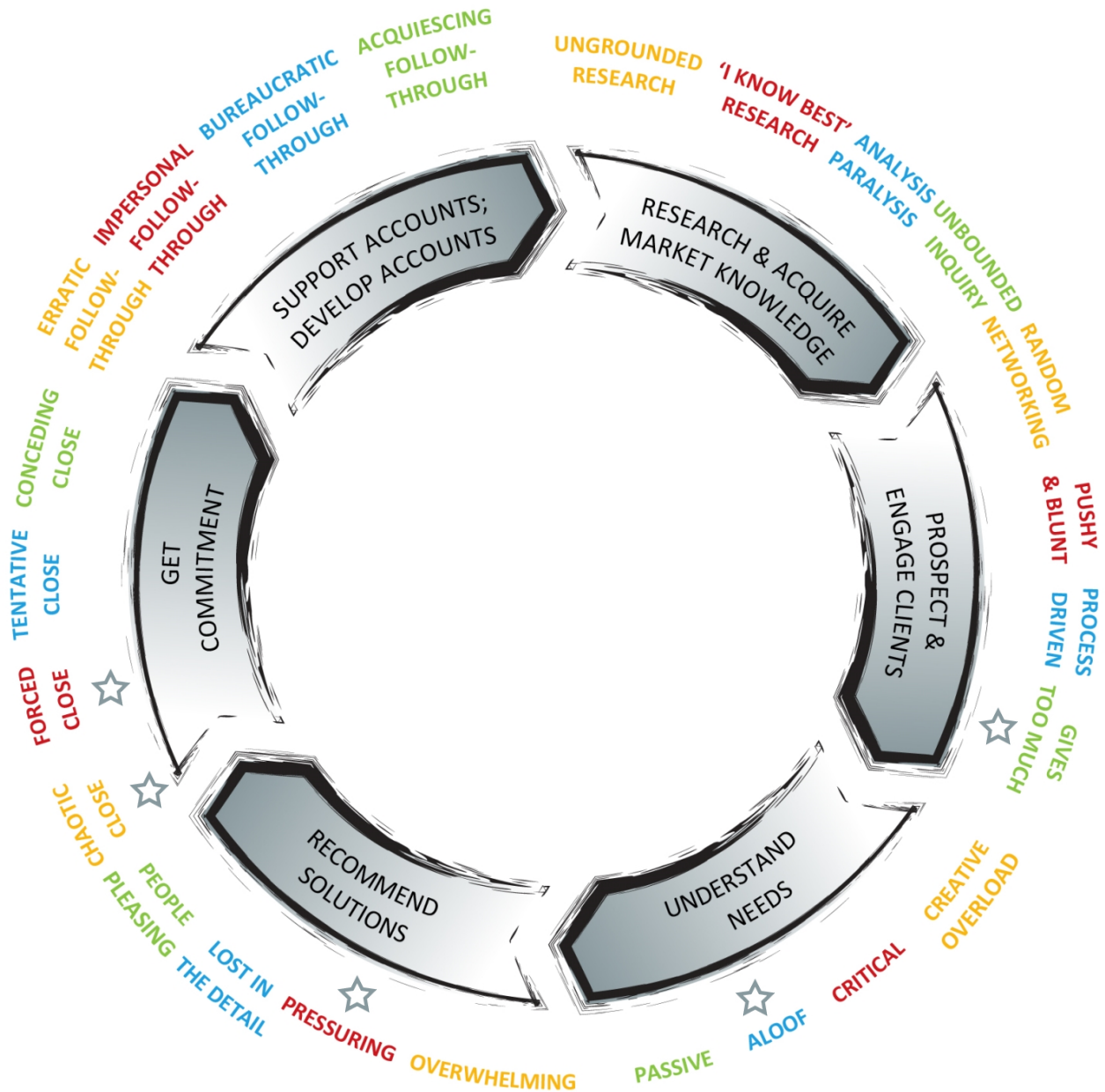
☆ - These are your 'top five' overextended Sales qualities.

## Your 24 Sales Qualities – Assigned to the Six Stages of the Sales Cycle



- ☆ - These are your 'top five' Sales qualities that come most naturally to you.
- - These are your 'bottom five' Sales qualities; they come to you less naturally.

## Your 24 Overextended Sales Qualities – Assigned to the Six Stages of the Sales Cycle

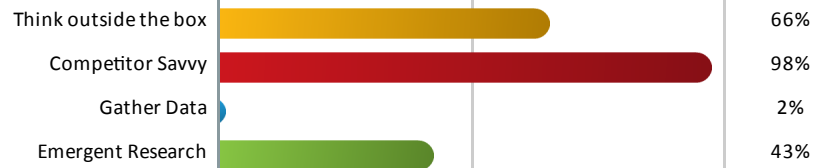


☆ - These are your 'top five' overextended Sales qualities.

# Sales Qualities



## Research & Acquire Market Knowledge



## Prospect & Engage Clients



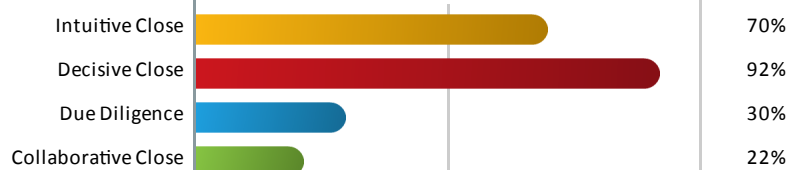
## Understand Needs



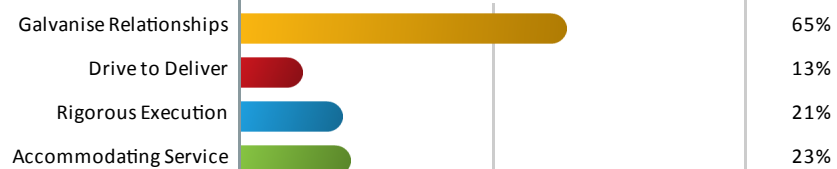
## Recommend Solutions



## Get Commitment

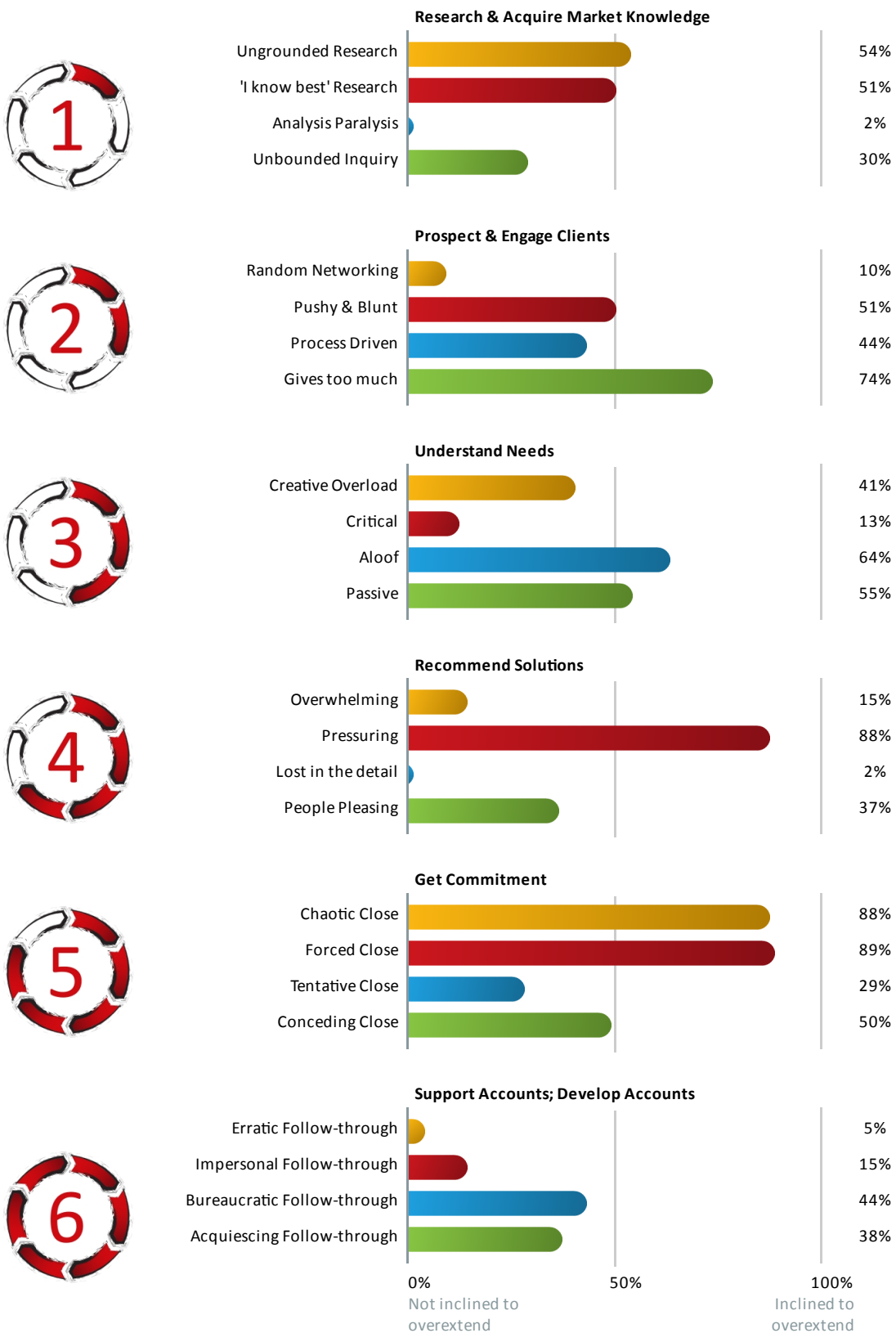


## Support Accounts; Develop Accounts



0% 50% 100%  
Doesn't come naturally Comes naturally

# Sales Qualities Overextended





### Sales Process

Understanding current market trends is key in tailoring your offering and sales strategies to attract top clients. Research and preparation is thus vital, and must be both flexible and rigorous so as to gain a broad understanding of current market forces. This will be invaluable in innovating and distinguishing yourself from competitors.

To do this well you need to work through the following four-step process:

1. Know the market; know the competition
2. Identify key clients
3. Develop entry strategy
4. Build call plan

### Sales Qualities

In order to work this stage well, you also need to demonstrate key behaviours – we call these your ‘Sales qualities’. You need to engage four different parts of yourself to do this well:

#### Think outside the box

Good opportunities do not readily present themselves and it may require an application of lateral thinking in order to locate them. In order to develop client relationships it is crucial that you form an innovative strategy around your understanding of the current forces that exist within the market.

#### Competitor Savvy

It is important to have knowledge of who your competitors are in the market. This insight will allow you to identify areas of opportunity where you can capitalise on competitors' weaknesses. It is always useful to know what you are up against so that you can effectively distinguish yourself.

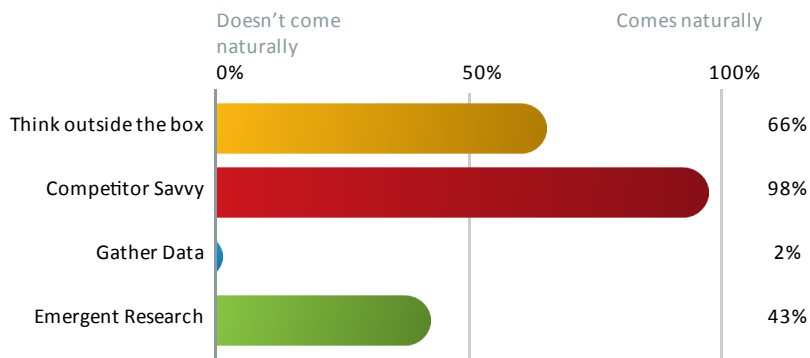
#### Gather Data

Having a concise knowledge of the facts and figures will assist in developing business opportunities. Before venturing out to secure a sale, gather enough evidence and data to support your work. Accurate and rigorous research is the key to a strong platform for an effective sale.

#### Emergent Research

Being able to identify current trends in today's unpredictable and ever-changing markets is a useful skill when preparing for a sale. In such a climate, an emergent research model is a very effective way of changing your approach in order to take new information on board.

# Research & Acquire Market Knowledge



## Your natural strengths in this stage:

- You are good at pulling together different pieces of research to form a complete picture of your client
- Your direct and uncompromising manner allows you to get straight answers to your questions; you will not allow yourself to be dissuaded from finding out what you need to know
- One of your core strengths is that you begin your preparations with an open mind and follow up each new piece of information as you find it

## Possible shortcomings in this stage:

- You can find it difficult to reach an agreement with others which can cause problems if you are trying to secure their aid in the course of researching your client
- Sometimes you have trouble translating information you have gained from research into steps you can put into practice when you actually meet with a client
- Sometimes you do not put enough emphasis on researching a client's personal preferences and this can make it hard to build emotional rapport further down the sales cycle

## How to develop the qualities in this stage:

- Make an effort to pay more attention to detail as you research the client; this will ensure that any decisions you make are based upon real evidence
- Try to plan your research so that there is a clear structure and reasoning behind your approach
- Actively gather feedback on your client's communication preferences so you won't feel lost during face-to-face interactions

## Research & Acquire Market Knowledge - Overextended



Preparation is a key part of any successful sale and it's always important to gather sufficient information on a client as you try to design the perfect pitch. However, excessive research and planning can be costly and can have a negative impact on the actual sale itself by stifling new opportunities and possibilities that may arise as you deal with a client. Furthermore, basing your judgement and approach on set facts and figures can give an unimaginative, rigid impression of your services that can leave the client feeling uninspired.

### Ungrounded Research

Researching the market for new opportunities is paramount, but it can be a costly investment in time and resources. Without the correct guidelines your research can become general and irrelevant to the client at hand. It may be useful to map out the course of your research beforehand.

### 'I know best' Research

When research is based too strongly on your own directions you may risk neglecting potentially fruitful avenues of enquiry. You may be left with little more information than that which you started with. Try to identify the best possible research techniques and apply them accordingly.

### Analysis Paralysis

An overwhelming, indiscriminate body of data can be confusing to interpret and become a hindrance to effective sales process as you can become stuck in analysis and indecision. Centralise data and information in order to recognise the accurate material and filter out the bits you need.

### Unbounded Inquiry

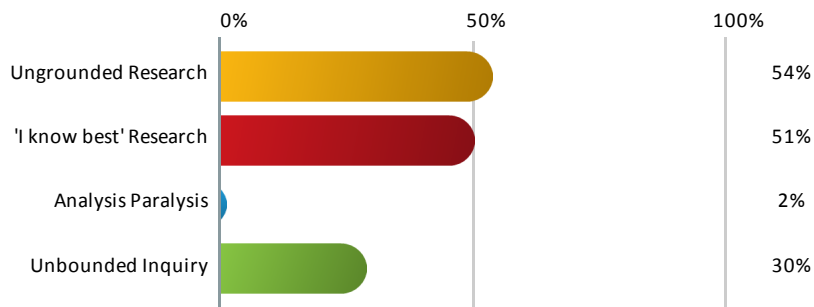
Changing your research approach too frequently can stop you from being able to complete it in enough depth. Knowing when to rein in your flexible approach will allow you to garner the necessary detail from your research and ensure you don't spread yourself too thinly.

## Research & Acquire Market Knowledge - Overextended



Not inclined to  
overextend

Inclined to  
overextend



### Some ways you may overextend in this stage:

- You can be too fixated on getting your research done perfectly and this can cause you to feel unnecessary time pressure
- There are times when you can theorise based on too little research information and draw conclusions that turn out to be misleading
- You can be a bit too creative at times and this means that the research you carry out can lack applicable substance

### How to temper your overextension in this stage:

- Don't become too distracted from your initial research goals so that all the information you find can be used to hone your pitch
- Try and not to be too direct when pushing for results on your research so that others feel comfortable working with you on the sale
- Don't become too fixated on getting your research done perfectly to outdo your competitors, as preparation alone will not win you the sale

### Sales Process

Prospecting is the crucial sales stage where initial contact occurs. It is firstly important to sieve through a wide network to attract diverse potential clients and establish strong market presence. It is then vital to forge strong rapport with the potential client through a robust business case and clear awareness of their specific demands.

To do this well you need to work through the following four-step process:

1. Access & engage stakeholders
2. Create value hypotheses
3. Purposeful argumentation to shape business case
4. Dialogue with clients on the business case

### Sales Qualities

In order to work this stage well, you also need to demonstrate key behaviours – we call these your ‘Sales qualities’. You need to engage four different parts of yourself to do this well:

#### Proactive Networking

Knowing how, where and when to network is crucial! It is important to actively manage and expand your network as such contacts can lead you to immediate opportunities as well as helping you maintain a strong presence in the market.

#### Purposeful Argumentation

It is important to know how to sell your services to existing and potential customers. Engaging clients with a robust business rationale can help ensure that they are fully convinced your offering will meet their needs.

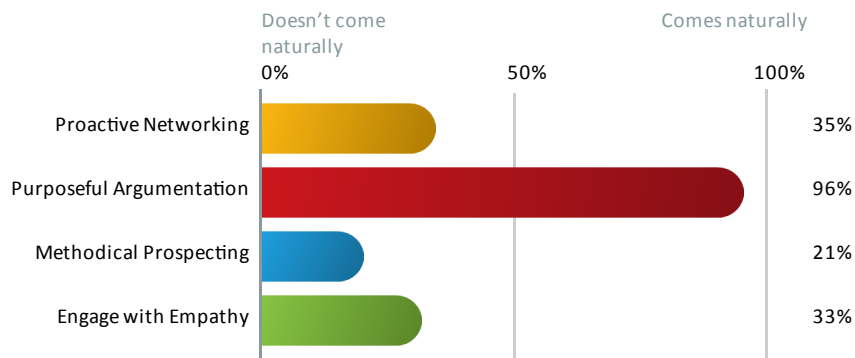
#### Methodical Prospecting

As you begin engaging with clients it can be useful to take action and identify useful sales methods. By diligently following pre-established strategies you can increase your chances of success in the knowledge that you know exactly where you are headed at any given stage of the sale.

#### Engage with Empathy

Sales and business opportunities are important, but so is maintaining a strong, open rapport with clients. Building a sense of mutual trust and respect is a highly effective way of engaging clients and making them feel comfortable when working with you and sharing their needs.

## Prospect & Engage Clients



### Your natural strengths in this stage:

- You use your strong critical thinking skills to identify what makes your offering stand out and attract big clients
- You are good at generating new ideas on the fly, working them seamlessly into your presentations to address the client's needs
- You are good at objectively assessing the market so that when approaching clients you allocate the appropriate amount of time and resources

### Possible shortcomings in this stage:

- You find it difficult to string together a series of facts and case studies to reinforce your appeal to clients
- Sometimes you fail to identify and pursue the set of leads that may bring the most value
- When you are trying to establish the initial connection with a client you can have difficulty doing so in a subtle manner and end up overwhelming them

### How to develop the qualities in this stage:

- Don't be thrown off guard by a withdrawn, hesitant client; try to win them over with your energy and passion
- Try to include enough practical steps in your initial pitch to reach out to pragmatic clients who like to work under realistic terms
- Try to appeal to your client's emotional needs so that you can immediately establish a strong connection

## Prospect & Engage Clients - Overextended



When you are prospecting and connecting with a client it is important to recognise the way the mood is shifting. If you can sense that you are losing the client's interest it is important to maintain the momentum of the sale through to the end by evolving your initial proposal as the sale progresses. However, you must not lose track of your initial targets as if you stray too far from the initial pitch to please your client you may decrease the business prospects in the opportunities you have created. Maintaining a relationship is important but bear in mind the costs involved in any compromises you make.

### Random Networking

Networking should be kept in line with your business goals. Maintaining a growing and healthy network is important but if you become too embroiled in social relations it can become a waste of precious time and resources. Therefore, avoid any prolonged periods of socialising if you are not getting anything to show for it.

### Pushy & Blunt

People can struggle to connect with your aims and be put off by your clinical approach. Diplomacy is vital when approaching customers and potential clients. As you try and seize opportunities make an effort to avoid becoming too assertive and direct in your handling of people.

### Process Driven

Establish and explore different avenues to expand your business pursuits. Persistently sticking to the process in order to 'play it safe' may result in losing out on the opportunity to explore broader possibilities with a client. This can negatively impact the chance of further business.

### Gives too much

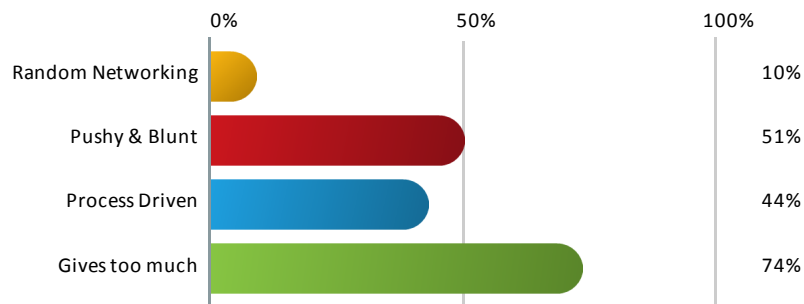
Making a personal connection with clients can sometimes be very draining. Stay alert to the possibility that engaging with a client is proving more draining than anticipated. Be firm with yourself and stop the sale if it will prove detrimental to you instead of trying to keep the client happy.

## Prospect & Engage Clients - Overextended



Not inclined to  
overextend

Inclined to  
overextend



### Some ways you may overextend in this stage:

- Sometimes you force clients into agreement as a result of your desire to build lasting, evolving relationships
- At times you empathise too strongly with the client and end up overselling
- When you overextend your natural strength with complexity can cause you to change your proposal to something too complicated for your client's needs

### How to temper your overextension in this stage:

- Spending too long planning your strategy and following a set of steps to interact with your clients can make you seem slow-paced and uninspiring
- Be careful when making an immediate competitive approach towards clients as it might reflect your own interests rather than theirs
- Give the client more time before pushing them for a commitment to ensure that they feel comfortable with the arrangement



### Sales Process

Constant interaction is the key to understanding the client's preferences, communication style and needs. It is thus important to stimulate the client with insightful questions and your full attention. Fluid, consistent communication will enable you to identify and address their concerns and assures them your delivery will be first-rate.

To do this well you need to work through the following four-step process:

1. Qualify client in; qualify client out
2. Understand client decision process & buying criteria
3. Go? No go? Assess probability of making the sale
4. Internally - secure funding to design a solution

### Sales Qualities

In order to work this stage well, you also need to demonstrate key behaviours – we call these your 'Sales qualities'. You need to engage four different parts of yourself to do this well:

#### Stimulating Ideas

Continuously developing ideas will help you to inspire your clients. It's always important to enthuse the client with your ideas and solutions. This can be done by taking a creative approach when addressing their needs and demonstrating that you can provide them with a range of answers.

#### Voice of Reason

By utilising an analytical approach you can quickly identify the areas where you may be able to support a client. By using a focused and rational approach you can help bring clarity to a client's situation and construct various possible solutions.

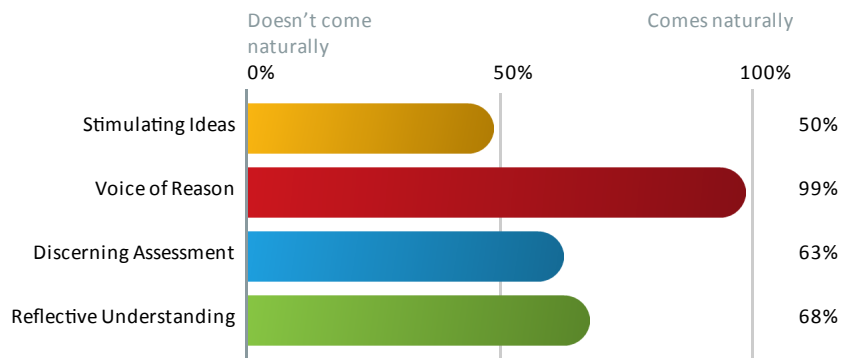
#### Discerning Assessment

In order to ensure their satisfaction it is crucial that clients are kept informed and up to date at every stage of the process. It is always important to ask the client for their thoughts and feedback. This allows you to get a complete picture of a client's situation and how you can help them address it.

#### Reflective Understanding

Client concerns should be a number-one priority. It is essential to always give your clients the chance to air their views as they will be more willing to engage with you and share their concerns if you make it clear that they have your full attention.

## Understand Needs



### Your natural strengths in this stage:

- Your desire to make the most competitive offer motivates you to fully understand your client's needs
- When listening to clients you are seen as thoughtful and reflective
- You are careful to make sure you understand your client fully before moving forward with the sales process

### Possible shortcomings in this stage:

- You can have trouble injecting energy and enthusiasm into a conversation which can be a problem if your client responds best to enlivened discussion
- You can struggle to build a connection with clients who try to engage you in an innovative discussion
- There are times when you struggle to adapt your listening style based on your client's preferences

### How to develop the qualities in this stage:

- Try to make extra effort to proactively move discussions forward when you encounter clients who are very driven
- Try to sustain conversations with a client even when the topic shifts to pragmatic matters
- Make sure you are able to deliver on any actions or commitments you make as you attempt to meet the client's needs

## Understand Needs - Overextended



When you face a client, listening effectively is crucial for building rapport as well as for identifying the client's needs. However, if you overextend in this skill you may become passive and forget to address your own goals, as well as failing to maintain a strong flow of communication whereby both parties understand each other's needs. Keeping your own agenda in mind as you start to build your relationship with the client is important not only to account for your own interests but also to keep the process focused and dynamic.

### Creative Overload

A mixed approach is important; when you go overboard with your creativity your innovation can overwhelm the client and put them off from working with you and sharing their needs. Sometimes a more grounded approach can lead to better engagement with a client.

### Critical

Meeting goals and aims is important but so is connecting at a personal level. Your desire for results and progress may be perceived as aggressive and the client might shy away and feel uncomfortable disclosing too much to you. Make a point of listening to their personal concerns.

### Aloof

There is a chance that clients may view a considered approach as too detached from their actual needs and this can make them withdraw from you. Give a customer a comfortable environment to air their views and keep your attention in tune with their expectations.

### Passive

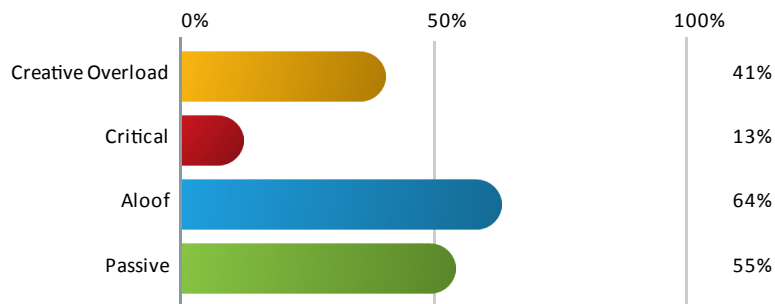
Without airing your views it can be hard for clients to know that you understand their situation. It is important to show the client that you are fully engaged and sensitive to their thoughts and concerns. If you do not demonstrate your understanding you may come across as uninterested in the eyes of the client who may then feel uncomfortable speaking openly.

## Understand Needs - Overextended



Not inclined to  
overextend

Inclined to  
overextend



### Some ways you may overextend in this stage:

- There may be times when your clients can become too inventive because of your encouragement and they can start to express unfeasible ideas
- Sometimes you can appear serious under pressure and this may give your client the idea that you disapprove of something they are saying
- Sometimes you give your clients too much room in a conversation and they can become quiet as a result

### How to temper your overextension in this stage:

- Listening is important when understanding the client, however don't forget to prompt your client with questions if the conversation stalls
- Be careful not to slow down the progress of your discussion with a client with your insistence on covering everything fully
- Don't be too trusting as it is good to be inquisitive and probing in the initial discussions as you try and identify the client's precise needs

### Sales Process

Your proposals play a vital role in winning the client over to your offerings. A proposal must be thorough so that the client is clear on what you are offering. You must also enthruse the client to enrol them into working with you in the long term. A strong relationship based on trust and openness is just as effective as an enticing proposal.

To do this well you need to work through the following four-step process:

1. Co-create a client-centered solution - define deal structure
2. “Know thy self, know thy enemy” - dispatching competitors
3. First presentation of proposal to client
4. Internally - secure funding to make a bid

### Sales Qualities

In order to work this stage well, you also need to demonstrate key behaviours – we call these your ‘Sales qualities’. You need to engage four different parts of yourself to do this well:

#### Enthusiating

By exciting your clients through energising and stimulating them you can quickly build a dynamic rapport. Doing this will enable you to draw answers from them in order to evolve your offering and address their precise needs. Maintaining a dynamic approach will boost client interest when you make your recommendations.

#### Convincing

When making a proposal it helps to demonstrate the ability to serve your client base with confidence. When recommending solutions to a client you must be able to convince them that your product is robust and that you can guarantee them the service you are promising.

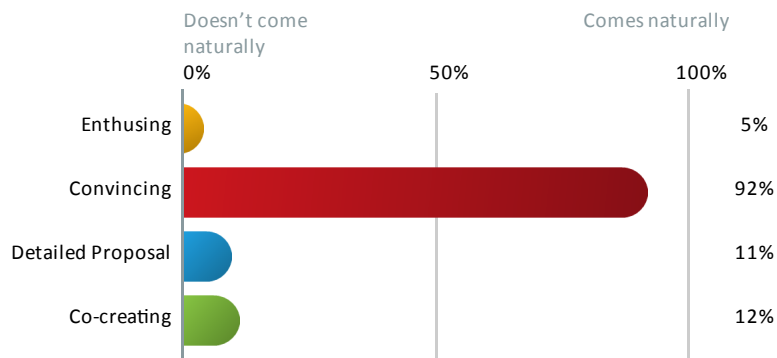
#### Detailed Proposal

A proposal should always reflect the quality of your offering. It is important that you include all the details which you believe may be relevant for the client. Presenting your products and services to clients with a clear plan of action backed up by past results will encourage clients to select your solution.

#### Co-creating

Negotiation and willingness to compromise can be valuable when shaping your sales offering. Displaying a desire for shared success and demonstrating willingness to work together is an effective way to win the client's trust. By working to the client's needs and making compromises when necessary you can ensure maximum satisfaction.

## Recommend Solutions



### Your natural strengths in this stage:

- Having communicated with your wide range of contacts, you have constructed a clear picture of your competitor's strengths and weaknesses, allowing you to make highly engaging proposals
- Your confidence around abstract matters comes across in your pitches, reassuring the client that they are in safe hands
- You have a highly creative and engaging way of proposing ideas to your clients

### Possible shortcomings in this stage:

- You may find it hard to support your proposal with timescales and commitments and this can make it hard to get client 'buy-in'
- You can have trouble leaving room for compromise in your proposals and this can make them less palatable for your clients
- You can have trouble pushing forward an ambitious agenda in your pitch to a client

### How to develop the qualities in this stage:

- If a client prefers a more intimate interaction then don't be afraid to set up informal one-on-one meetings when giving a pitch
- Try to reinforce your proposals with facts and figures to appease data-orientated clients
- When building proposals always take into full account any critical factors, based on current realities

## Recommend Solutions - Overextended



The clarity of your vision and ideas is important in order to leave a lasting impression on your client when you are pitching. Overextend in this domain however and you can become imposing and inauthentic, damaging your relationship with the client and endangering the sale. When you are pitching make sure that your proposals leave enough room to be tailored to win over the client when difficulties and breakdowns in communication arise; the success of your sale can hinge on your willingness to adapt and compromise where necessary.

### Overwhelming

Positive energy can sometimes be taken too far. If you keep on enthusiastically pushing your solutions on to the client they may feel overloaded with options. It is important to give them time to digest and reflect on your solutions and thoughts.

### Pressuring

It is important not to come across as too forceful when trying to convince the client that your offering is what they are looking for. They might feel put off by your directness and feel rushed into making a decision. Be prepared to back off and listen to their feedback, adjusting the proposal if necessary.

### Lost in the detail

The desire to make the perfect proposal can lead to hesitation and a lack of action. You can end up stuck in indecision trying to find the best way to win the client over. Focus on the first steps and demonstrate the feasibility to the client first before trying to hone the sale completely.

### People Pleasing

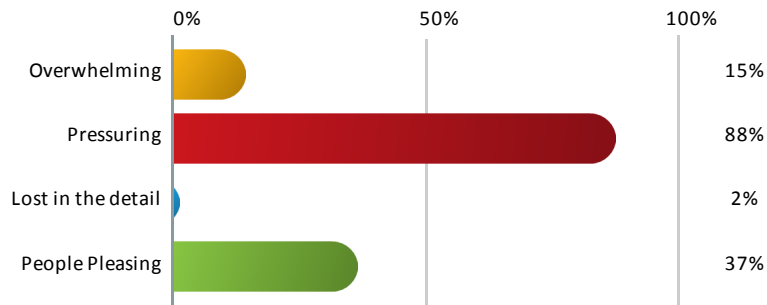
Accommodating your client needs is central to the business pursuit, but it is important not to overcommit when you customise solutions to address the needs of your client as this can lead to future difficulties when actually delivering.

## Recommend Solutions - Overextended



Not inclined to  
overextend

Inclined to  
overextend



### Some ways you may overextend in this stage:

- Sometimes you come across as controlling in meetings and your proposals can occasionally come at the expense of someone else's time to speak
- If you are pitching in direct opposition to others you can find it hard to play down your desire for shared success in order to make your pitch more impactful
- Sometimes you can make your point too forcefully and it can cause your clients to take a step away from your proposal

### How to temper your overextension in this stage:

- Be careful when you decide on a more assertive approach with the client as it can intimidate them away from your proposal
- Avoid being overly controlling in meetings as your proposals can be at the expense of the client's chance to raise key concerns
- At times try and play down your desire for shared success in order to make your pitch more impactful, steadily moving the sale forward

### Sales Process

Once your clients are in a buying mindset you must gain their commitment and seal the deal, remaining attentive to the client's signals so that you can capitalise appropriately. It is vital to maintain their trust by displaying a willingness to address their concerns. When all the signs are there you must seize the opportunity and act decisively.

To do this well you need to work through the following four-step process:

1. Document "best & final offer"
2. Final presentation of proposal to client
3. Negotiate with client
4. Due diligence & signing client contract

### Sales Qualities

In order to work this stage well, you also need to demonstrate key behaviours – we call these your 'Sales qualities'. You need to engage four different parts of yourself to do this well:

#### Intuitive Close

Be intuitive to client needs and potential business ventures. When you can sense that the client is open to the idea of accepting your proposals it is important to trust your instincts and truly seize the moment by acting decisively.

#### Decisive Close

It is important to firmly secure the deal and enrol the commitment of the client once you know all the details have been discussed. By pushing for a final answer you can ensure that the sale reaches its conclusion before you risk losing a client's interest.

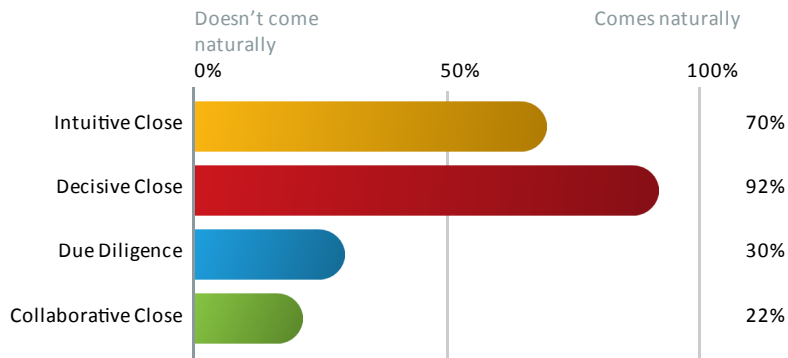
#### Due Diligence

Details are important and they can make or break a deal. Clients will be reassured if they know that nothing has been overlooked and everything has been clarified thoroughly. This will allow both parties to progress knowing that there are no hidden obstacles and that the sale will proceed smoothly once an agreement is reached.

#### Collaborative Close

An effective way to completely enrol the client is by closing the sale on a relationship basis. This can be done through a combination of a personal connection and professional understanding. By making it clear that you are considering their needs as well as your own you can assure the client of your win-win approach.

## Get Commitment



### Your natural strengths in this stage:

- You balance your desire to win a sale at any cost with a good knowledge of what promises you are actually able to commit to
- You push clients through a logical process that begins with expectations and finishes with commitments
- You keep the big picture in mind when finalising a deal, helping you balance the client's satisfaction with the limitations of your organisation

### Possible shortcomings in this stage:

- Your enthusiasm about achieving the sale does not always come through and this can make your client wonder about your level of commitment to the agreement and to them
- Some clients only trust what they have experienced themselves and you can find it hard to convince them to make a commitment if they do not have any past experience dealing with you
- There are times when the commitments you agree need more clarity and the lack of focus can make it hard for you to set expectations going forward

### How to develop the qualities in this stage:

- When the discussions come to an untimely halt due to unforeseen issues, try something new to come up with something distinct that may satisfy the client
- When reaching the final stages of an agreement give extra focus to the immediate realities and outcomes relevant to the buyer
- Make sure all the commitments you make in the initial agreement are well documented and clarified so that there are no critical oversights when it comes to delivery itself

## Get Commitment - Overextended



As your clients become keen to commit to an agreement it is important to act fast and be decisive so that you can fully seize the opportunity. However, don't lose your patience and consistency at the final hurdle trying to push them to commit. Moreover, being overly flexible can damage your interests and credibility. So long as you maintain the relationship through to the end of the sales process you will have a stable platform to fall back on in instances of last-minute breakdowns.

### Chaotic Close

Spontaneously jumping to conclusions and rushing the client into making a decision can be dangerous as it can be perceived as erratic and insensitive. Take a level-headed approach to client-based commitments, leaving time for both sides to consider the ramifications of their decisions.

### Forced Close

When the focus on the outcome is overplayed it can risk making the client feel uncomfortable. There is a further danger that clients can lose faith in the sale at the last minute if it is pushed too hard. Make an effort to recognise valid concerns and give space to other points of view.

### Tentative Close

When the sale is coming to a conclusion it is important to avoid grinding the process to a halt with indecision. You can lose the client's enthusiasm if you become too systematic in your desire to cover every detail. Try to stop at a workable level of detail and fill in the rest of the proposal further down the line.

### Conceding Close

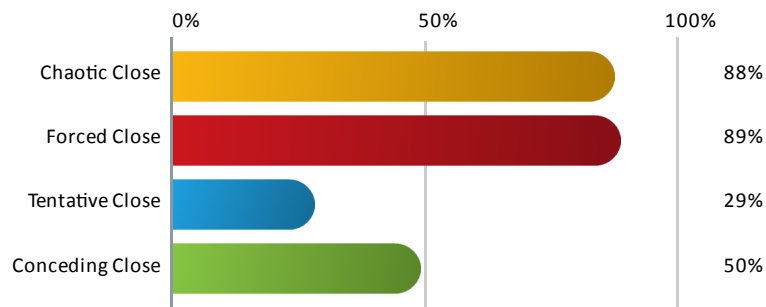
There is a chance that a people-oriented approach can lead to watered-down resolutions. This can lead to a weaker sale overall and uncomfortable commitments. Try and avoid changing your proposal beyond predefined limits. This will require a level of discipline when it comes to balancing good service to clients with good business results.

## Get Commitment - Overextended



Not inclined to  
overextend

Inclined to  
overextend



### Some ways you may overextend in this stage:

- You can occasionally come across too strongly in your negotiations and you do not always know when to back down from an untenable position
- You like to act spontaneously and seize sales opportunities as they emerge. However, this may be seen as too “last minute”
- Sometimes you are too cautious in your commitments and you don't give the client everything they want from the deal

### How to temper your overextension in this stage:

- Try to be assertive when the sale reaches its latter stages so that your commitments and promises remain realistic
- Don't push too hard for mutual benefit in a contractual sale if compromising may be a more effective way of securing the deal
- Don't be too overt with your attempts to control the contractual sale as this can upset the client



### Sales Process

Maintaining and enhancing your relationship with a client is important, allowing you to reap the rewards of your previous work and secure repeat business. Sustaining this relationship is as important as high-quality delivery. Make sure that when delivering you strengthen your relationship by sharing your energy and service ethos.

To do this well you need to work through the following four-step process:

1. Shift from winning sales to service delivery
2. New order process & sales tracking
3. Create account business plan & supporting processes
4. Seek additional sales opportunities

### Sales Qualities

In order to work this stage well, you also need to demonstrate key behaviours – we call these your ‘Sales qualities’. You need to engage four different parts of yourself to do this well:

#### Galvanise Relationships

Keeping up relationships and connecting with new people is an effective way to create new sales. It is also important to maintain rapport through continuous social engagement. This will keep you connected with your clients so that you can respond promptly to their needs.

#### Drive to Deliver

Clients want results even in the face of adversity. By showing your client that you believe in delivery at all costs they will feel that they can depend on you to provide the service they expect from the relationship. From this basis you can develop more ambitious goals for your clients and the relationship will flourish.

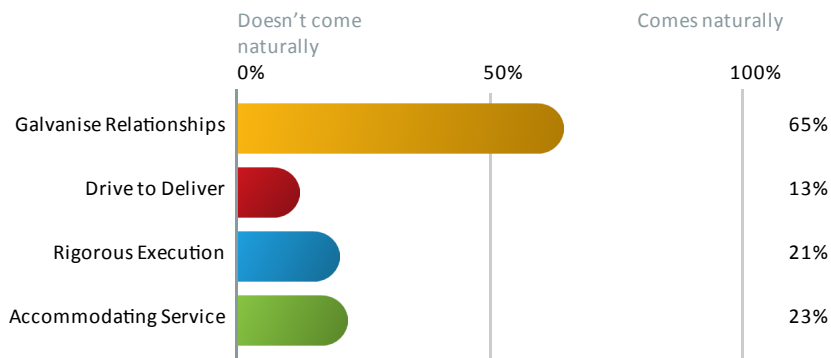
#### Rigorous Execution

When delivering on your commitments, planning the steps out in detail and ensuring that your estimates are accurate gives clients confidence that deadlines will be met. Clients will feel more at ease after they see evidence that you are dependable and organised.

#### Accommodating Service

Create an environment where customers can have input at any stage of the process. When you execute a plan in order to follow up on your actions make sure that the client feels fully involved and kept up to date throughout the process. This rapport is equally as important as the delivery as it reassures clients of your service mentality.

## Support Accounts; Develop Accounts



### Your natural strengths in this stage:

- You are good at keeping tabs on clients, often following up a sale in writing to gauge their satisfaction and offering opportunities to give feedback
- You are good at delegating some of the tasks around following up with clients to those around you, helping foster client satisfaction and repeat sales
- Though you often appear as if you act on the spur of the moment, you are in fact highly attentive to the needs of your clients and spend a lot of time making sure they are pleased with your service

### Possible shortcomings in this stage:

- You may struggle to convince clients that you can consistently provide them with interesting new sales opportunities
- When planning the follow-through to your sales commitments your plans can lack the necessary detail to reassure your clients about your ability to deliver on your promises
- You can struggle to maintain a focus on shared success and your clients may start to feel that their interests are better served elsewhere

### How to develop the qualities in this stage:

- Make sure that your delivery is always to the standards agreed in the initial proposals so that you and the client are always making progress
- Don't fixate too much on established processes that might hinder you from consistently delivering on your commitments and meeting the expectations of the client
- Always try and follow through on the agreed actions at all costs so that you do not damage your relationship with the client



Having secured a sale it is important to deliver against your agreed commitments. This follow-up phase is crucial to ensure that you can maximise all the business opportunities presented to you by the client. It is important to build on the existing relationship with immediate action, to show ongoing commitment and integrity long after the terms were agreed. Maintaining and growing your relationship is just as important as securing the sale in that it can open up new business via referrals or repeat purchases.

### Erratic Follow-through

If you act in a rapid and unpredictable manner, it can sour and affect your relationship with the client. You can lose the trust of your clients if you become sporadic in your delivery on your commitments. Keep a clear record of your commitments to ensure that you do not lose track of them.

### Impersonal Follow-through

There is a danger that being clinical and simply focusing on the outcome can damage the rapport between you and the client. They may be looking for a lasting relationship that produces new opportunities rather than just a one-off offering. Focus on a deeper, personal connection that can form the basis of a more effective partnership.

### Bureaucratic Follow-through

If delivery is overplanned then new deliverables may be avoided and actual delivery can be held up by process. If you are not open to new opportunities then they can disappear and clients can feel let down. Try to build scope into your plans so that you have the room to take on new commitments as they arise.

### Acquiescing Follow-through

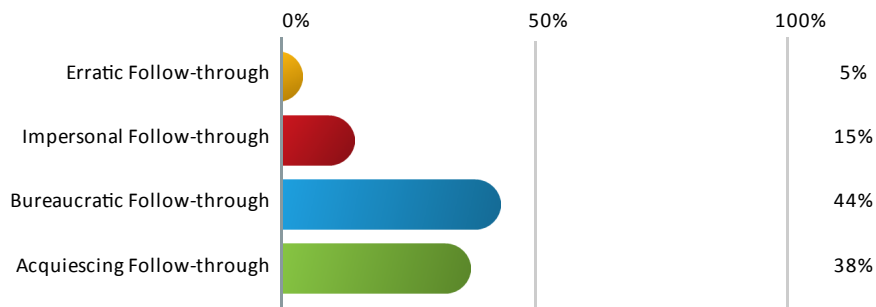
In your desire to keep the client feeling involved you may become too accepting and end up promising more than you can deliver. Try to avoid letting your connection with a client create an unspoken pressure on you to give more than you can manage. In order to avoid overstretching your resources draw a line in the sand and stick to it.

## Support Accounts; Develop Accounts - Overextended



Not inclined to  
overextend

Inclined to  
overextend



### Some ways you may overextend in this stage:

- There are times when you can place too much emphasis on an emotional connection with your clients
- When unforeseen developments arise you can have trouble making time for supporting your clients

### How to temper your overextension in this stage:

- Avoid placing too much emphasis on developing an emotional connection with your clients as you must first deliver against your commitments to show your competency
- Don't depend too much on plans as you go about delivering on your commitments as unforeseen developments may derail the client relationship



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