How to Sell Professional Services

This is a 6-minute read that identifies the difference between selling services and selling products, and suggests that a good sales executive is more like a consultant than a salesman.

Selling professional services is quite different from product sales. There is nothing tangible to display, no tires to be be kicked, and never a money-back guarantee. The sales executive is obliged to engage with a prospect at a basic level of need and cannot rely on the showroom to trigger a response to the "I'll recognize it when I see it" approach. Services sales practice is usually longer term and in essence involves building a relationship in an atmosphere of trust.

I have worked alongside sales folk, good and not so good, for the majority of my career as a systems engineer and later as a project manager. Even been on a few sales training courses, such as Objection Handling, that are useful in other endeavours. That is not the purpose of this post. What I would like to share is the observation that most successful sales executives practice more like consultants than salesmen, and follow a describable process that can be analyzed and learned.

Objectives of the Sales Process

The overall goal of the process is, of course, to close the sale. The key to the consultative approach to achieving this lies in applying methods to meet three very specific objectives. The first is to develop and agree an accurate diagnosis of the problem with the prospect. The second is to apply a truly interactive means of communication that makes the prospect feel listened to, but also involved in the development of a solution. And finally, trust must be established between sales executive and prospect.

To label these as part of a process is perhaps misleading, as it might suggest things happen sequentially as step 1, step 2, etc. In fact, these objectives are often pursued in parallel, or with overlap. The important thing to focus on is the achievement being sought 'in the moment', and to never do anything in pursuit of that to undermine the other two elements.

Diagnosis

A common mistake made by sales folk, and often by prospects, is to bypass this stage altogether and move directly to solutions. Tempting as this may be, especially if the prospect has a prejudicial view of what is required, it is wiser to engage using a select set of carefully chosen questions designed to uncover the prospects real problems and needs. Listening, understanding, and analysis, but definitely not the sales pitch, will help establish a shared view of why the services are required.

The specific techniques of analysis will depend largely on the nature of the product, or application area. On early exploratory or cold calls, the sales executive should have sufficient skill to move the sale forward, but also be aware when complex situations require analyst support. It is helpful to have a generic model of the business being serviced, to provide a framework for good probing questions. For example, in the software systems business, a starting point is to determine the basic drive behind the initiative. Is it internal efficiency, to exploit innovation, external customer support, sales support, maintenance, marketing, regulatory adherence, and so forth? Having a reliable framework will support the sales executive in performing useful diagnosis.

Interaction

This is a complex skill but hinges on a universal need for genuine engagement, ongoing attention, and responsiveness to feedback. The services business does not operate within a conventional acquisition process of comparison with desired specifications, and is rarely built on a sales approach that only consists of specifying, pricing, and delivering a product.

Interaction skills are naturally a part of the diagnosis, but I think they are of particular importance during solution development. The potential client will, rightly or wrongly, have some preconceived ideas on what is needed, and they will not embrace your solution if they feel it is a case of 'take it or leave it'. The executive must deploy her sales kit expertly to meet the goals of interaction. This, depending on the nature of the service, might include determining appropriate reference calls and site visits, working on cost/benefit analyses, selecting customization options, identifying and eliminating objections, and most significantly aligning the strengths of the solution with the prospect's underlying problems and needs.

Trust

There must be a degree of trust between the parties, making integrity a vital personal attribute for meaningful diagnosis and interaction.

Trust is a crucial ingredient for building commercial relationships, though trust is always conditional, difficult to establish and can easily dissolve. Commercial failures often arise from distrust and a lack of openness.

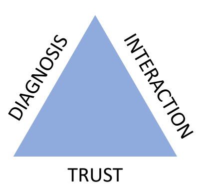
There are some straightforward rules that contribute to trust building that can be lifted out of life and applied to sales situations and projects. These include:

- Understand the difference between making a commitment and a promise.
- Don't overpromise.
- If a promise is not going to be kept, advise ASAP and apologize; keep the next one.
- Never tell tales behind someone's back.
- Don't disparage the competition.
- Don't claim credit that isn't yours.
- Don't tell secrets; have confidential conversations but keep them confidential.
- Tell the truth and differentiate truth from opinion.
- If you ask a question be sincere and don't brush off the answer.
- By all means do deals and favors, but not to anyone's disadvantage.
- If you are asked explicitly for information, then provide it.
- If asked for confidential information, well, now it's complicated; act with integrity.

Progressively accepting commitments and responsibilities and then delivering on them will earn trust. It is demonstrated by actions not demanded by words.

The Takeaway

It is common, though not universal, to choose senior executives in services firms from the ranks of the sales force. There are good reasons for this, but in my younger days, in common with my fellow practitioners, there was some resentment with this state of affairs. My message now to younger colleagues who might harbour similar sentiments is to remember – without the skills of those selling your services, you would have no paycheck! But the most telling observation is that these negative and disruptive feelings are much more obvious when executive promotions occasionally go to those who rely on personal presence for their success, and demand too much from the practitioners. Sales executives who operate with consultative skills of their own are respected, and the morale of their team is higher.



Of course, there are many skills and personal attributes that contribute to sales success, and I am not suggesting that methods are the be-all and end-all. But I would claim that the ability to work with a prospective client to diagnose their problem, to interact sincerely to derive a jointly agreed solution, and to establish a base of trust, represent a necessary (though perhaps insufficient) condition for long term sales success.

Finally, a common way to view the sales executive role is as a client manager, a role that is sometimes used as a title. A client manager in the professional services firm draws skillfully from the firm's practitioners and those associated with ongoing client work to create the concept of an account team. This leads to a practice known as team selling and the team leader is the client manager. Definitely not a 'sell and run' salesman.

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Robin's new book Commercial Project Management – A Guide for Selling and Delivering Professional Services published by Routledge is a complete exposé for the commercial environment. The complementary 2-day seminar, delivered in Robin's enthusiastic style, is packed with insider tips, techniques, and (mainly) true cautionary tales. Contact Robin at tmi@telus.net. A pdf download of this article can be found at www.tmipm.com

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