

Sales Success and Trusted Partner Relationship

In our last newsletter, I referenced a recent article in CSO Insights¹ by Barry Trailer, who explains that the research demonstrated how a company's sales success is influenced by the interaction of two features: the sales process and the prospect (or current customer) customer relationship. The highest level of success combines a dynamic process with a trusted partner relationship.

I wrote about The Whale Hunters Process as an example of a formal, dynamic sales process, which is associated with sales success. This week, I'm writing about the other piece of that equation: the "trusted partner" relationship. It's about moving up the relationship ladder from the level of "approved vendor" to "trusted partner."

Trailer believes that it is easier –and faster—to improve your company's sales process than it is to build a trusted partner relationship with a prospective customer.

I agree with his assessment. I also believe that it is quite unlikely that you can achieve "trusted partner" status during the sales process with a brand new customer. That is more likely to develop over time through multiple contracts with an ongoing customer. Therefore, it is critically important that you begin to develop a relationship of trust from your earliest contact with a new customer. I would always approach a large sale opportunity with the intent of working towards a position as trusted partner rather than approved vendor; at the same time, I am realistic about the time and energy required to become a trusted partner.

I know it's trite to say "develop a trust relationship." Of course you are trying to establish a trusting relationship or, at least, you are not deliberately trying to do the opposite. But that's not as easy or as automatic as it may seem. There is a difference between having a number of trustworthy people on your team and coaching that team to present a totally "trustworthy" face to the new customer. Here are three common pitfalls that damage trust and suggestions on how to overcome them.

1. Internal Handoffs Damage Trust

- **Pitfall:** It's not unusual for the lead salesperson to wrap up the deal with a comment like this: "Well, if they don't take good care of you, just call ME! I will make sure you get whatever you need." On one hand, this is a promise to guide the new customer through your company's procedures. On the other hand, it seems to imply that the salesperson is not confident about how the internal team will handle the new engagement. He or she is, in effect, undermining the rest of the operations team. Another example is the Help Desk person volunteering that she's heard Training is running a few weeks behind schedule, or the Project Manager who reports that he's having issues with the Development team.

¹ http://www.csoinsights.com/Blog/Sales_Relationship_Process_Matrix

- **Recommendation:** Be certain that everyone on your team understands how that kind of casual conversation can damage the trust relationship you are working so hard to build. Bring them together to plan the on boarding process. Discuss the ways in which your team may have created distrust in the past and how they can work more positively together in the future.

2. Early Encounters Damage Trust

- **Pitfall:** Do you know the first step that your team will take to bring a new customer on board? Who makes the first call? What is the first step? Who is in charge of the sequence? Who is responsible for managing communicating to your new customer?

I have had any number of clients who cannot answer those questions. In one case, the first phone call to a new client came from an IT employee demanding access to the new customer's data! The person on the other end of the phone had no idea about the sale or the upcoming process and was understandably outraged by the request.

If you leave this process to chance, you run the risk that any number of our own employees will make what they consider to be an important outreach to the new customer only to find that the person they talk with is not up to speed with the project. Your company starts to look uncoordinated, out of control, and populated by loose cannons.

- **Recommendation:** Don't trust your new customer's team to communicate the deal to everyone on their end who will be involved. Assume that they will handle it badly. Therefore, you need to have a clear and decisive process for how to learn who will be involved and how to manage team communications. It is a critical internal management process for you to develop.

3. Trust Diminishes Over Time

- **Pitfall:** When you bring a new, big customer on board, it is typically a cause for celebration in your company. A lot of people pay a lot of attention to this whale. Resources are allocated to the people who are responsible to serve this account. Likewise, the new deal may be a high priority project in the whale's organization—at least in the department or division with whom you will be working.

But before long, your company has brought in other new accounts. The customer company has bought more and different services and products. Your deal is no longer top of mind, either in your company or your customer's. Perhaps it has moved from what was perceived to be a strategic relationship to one that is merely tactical because it has been implemented and it's working. In fact, the easier you make it on your customer to come on board to receive the products and services they bought, the more likely it is that they will accept you as "business as usual."

- **Recommendation:** In The Whale Hunters lingo, "celebrate the whale." Identify some milestones at which your team will reach out to the customer's team in gratitude. Send cupcakes. Feature them on your website. Support one of their charitable events. Invite them to your

headquarters for a project review, and re-set the go-forward plan. Report on progress. Make suggestions. Primarily, be proactive in how you engage them over the long term.

The CSO Insights research proves that your company's ability to develop "trusted partner" relationships can become a huge differentiator. But it's going to take a concerted, long term effort on your part.