Course Overview & Modules

Effective Communication, Sales & Negotiation Skills for the Technical Professional

Studies of the "best practices" of successful businesses reveal a strong correlation between achieving superior business performance and being leaders in communication, sales, account management and customer service. Skilled communication impresses clients and colleagues, promotes the effective flow of information, and creates a more harmonious and productive business environment, while poor communication skills can cause confusion, frustration, misinterpretation, inefficiency, and lost business. Moreover, ineffective communication can limit a technical professional's potential growth and value to the organization.

In addition, today's competitive business environments require that technical professionals be able to "sell". Internally, you "sell" as you compete for resources, advance your projects and careers, get buy-in to ideas and strategies and promote change. Externally, you sell products, services, or projects to existing and potential customers. Do you have a well-defined process to follow and does it lead to success? If not, you may be struggling with some of the hazards of ineffective selling skills in the technical environment, such as doing "un-paid consulting" in hopes of attaining business, chasing after poorly qualified opportunities, caving-in on price, and chasing after decisions.

Technical enterprises often find that their technical professionals have outstanding technical expertise, but are unfortunately lacking in the necessary "soft skills" -- communication, sales, negotiation and customer service skills-- to be effective in the business development arena. Fortunately, this is not usually due to lack of ability in these areas, but rather a lack of training.

This course focuses on the communication, sales and negotiation skills that are necessary to be an effective "business developer". **It promotes a consultative, "win-win" approach to selling and business issues in general, designed especially for technical professionals.** The focus is on the systematic application of a logical process including effective questioning, listening and communication skills, an understanding of the human elements involved, and the necessary strategies and techniques.

Through self-assessment surveys, participants learn about themselves (behavioral style; internal "scripts"; preferred information processing modes) and how to be more effective in dealing with customers who are different. Best practices are stressed along with a set of tools and techniques that can be applied immediately to improve their confidence, credibility and effectiveness when interacting with customers.

Course Objectives

- Equip technical personnel with basic communication, sales, and negotiation skills to interact effectively with customers and colleagues.
- Help develop the strategies and techniques necessary to better recognize and control selling opportunities.

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What You Will Learn (*The content is customized to address the participants' specific issues.)*

Sales Strategies & Tactics

- How to persuade and convince customers about an issue
- How to cultivate relationships with new customers
- Getting buy-in from internal management/team
- Understanding and utilizing a 9-step selling process that works in a technical environment
- Overcoming the stigma of "selling"
- How to construct a value proposition that works with your customers
- How to sell a "solution", as opposed to "a standard product" or service
- Presenting your capabilities—how and what to present
- How to effectively communicate and "sell" to people whose personality and behavioral styles are different from yours
- Knowing how and when to use your technical knowledge and expertise so it doesn't hurt you
- How to avoid "un-paid consulting"
- Understanding and identifying business opportunities: the needs, wants, problems, and motivating factors for action
- How to help internal or external "prospects" discover they need your idea, product, service, etc. and why "convincing" won't work
- How to overcome fear of rejection
- Controlling the selling process—knowing what is going to happen next
- How to differentiate yourself from competitive options
- How to avoid "Think it overs"
- How to get add-on business from existing clients and referrals to new opportunities
- How to separate a "real" opportunity from a "resource drain"
- How to define and implement the actions that are necessary to reach your business goals

Communication Strategies and Tactics

- How to better manage customer expectations (How to keep your customers happy)
- Changing a customer's negative perception or position
- How to avoid assumptions and confusion when interacting with customers
- How to effectively follow-up with a customer
- How to quickly and effectively establish rapport with someone new
- How to effectively deal with questions and objections
- How to run an effective meeting
- Getting colleagues/clients to make and keep commitments
- Questioning strategies to uncover the truth about where your client stands on an issue
- How to listen more effectively and talk less
- How to get people to feel urgency and make decisions/get closure
- How to deal with confrontational, demanding and and/or irate customers
- Why "small talk " may be costing you business and what to do about it
- How to replace communication awkwardness and frustration with confidence and control
- How to clarify work requests and eliminate wasted effort in re-do's.
- How to deliver "bad news", say "No", and discuss sensitive topics

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Negotiation Fundamentals

- How to apply win-win negotiating techniques and strategies
- How to deal with "No's" and Stalls
- When to give up on an opportunity
- How to get colleagues/clients comfortable enough with you to "open up"
- Identifying and eliminating potential problems early in the sales process
- How to create a process of mutual consent

Course Modules *(Course content is customized to address the specific issues of each group of participants.)*

1. **Fatal Flaw Analysis**
   Learn a technique for determining "things-gone-wrong/right", and transforming that knowledge into corporate or personal procedures/processes. Examples applied to communication and selling situations.

2. **How to Effectively Approach a Selling Situation**
   Get an overall understanding of an effective "selling" process and how to apply it in a technical environment, whether you're "selling" yourself, your ideas, your company, or your products and services. Understand what to do about a lack of differentiation in your market. Understand how you get stuck chasing after decisions that never seem to happen. Learn how to use the most commonly skipped steps of the sales process in the technical world. Learn why and how you do "un-paid consulting" and how to separate a "real" opportunity from a "resource drain". Learn how to increase your success ratio.

3. **How to get Clients/Colleagues to Make and Keep Commitments/Decisions**
   A. **Setting Verbal Contracts**
   Reduce time spent chasing people. Learn how to keep the sales process moving by clarifying the next step and getting people's commitments. Also, learn how to set expectations, get decisions and avoid doing "un-paid consulting" in hopes of attaining business.

   B. **Work Clarification Forms, Memo of Understanding, Meeting Guidelines**
   Learn how to clarify expectations regarding work contracts so delivery of the end result is improved, resulting in less rework and re-do's. (MIT grad students reduced their work load by 30% using this tool). Learn how to summarize conversations and decisions to facilitate effective communication and not be held up waiting for someone's input. Do you participate in meetings that are sometimes a waste of time? Understand the necessary components of an effective and well-run meeting.

4. **How to Establish Rapport with Customers and Colleagues**
   A. **How to communicate more effectively with colleagues, team members, management and customers through an understanding of the behavioral styles of yourself as well as others.**
   Over 60% of the people we encounter are not like us, so we need to know how to deal with them. Many technical people tend to discount clients or colleagues, calling them unreasonable or difficult, when they are simply dealing with a different communication or personality style than their own. The more you understand others, the more effective you will be in your professional interactions. Learn how different people respond to risk, change, challenging

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situations, and urgency. Learn how to "sell", how to deliver bad news or discuss sensitive topics, how to conduct meetings, and how to interact with people who approach things from a different perspective than yours. (Includes a behavioral style survey for participants)

B. Establishing Rapport Using NLP

People work well with people with whom they feel comfortable. Understand what it takes and learn techniques and strategies to make that happen quickly when meeting someone new. Find out about the downside of idle conversation and what to do instead. Understand how you like to process information (includes survey for participants) and how to adjust for the styles of others.

C. What to Say

You have a meeting scheduled with a client/prospect to discuss an upcoming project which may include a business opportunity for you. How do you start the meeting? What do you say? "Small talk" can be uncomfortable, ineffective and potentially damaging. Research shows that there are some critical issues to address in the first few minutes to establish the groundwork for a successful meeting. Learn these crucial issues, including what to say at each step.

5. How to Develop and Maintain Working Relationships

In the technical world, we tend to persuade, convince and "sell" others through the use of data. If someone doesn't buy-in to our point of view, the tendency is to bring on more data! Unfortunately, the importance of strong working relationships is often overlooked. Research shows that familiarity and trust are key ingredients in the decision process. These are fostered through relationships. Learn a tool that is useful in establishing and strengthening relationships.

6. Understand the Dynamics of Human Relations…

A. …take your communication effectiveness to new heights!

Understand the psychology behind what you communicate and how it affects your persuasion outcome. Learn why you may not be getting the responses from others that you desire. Understand why convincing won't work and what to do instead. Learn about the inherent "scripts" of yourself and your team, how they might be causing you problems and what to do about them. Understand what to do if you're too critical, or if you dislike confrontation. Learn who on your team would be the best person to deal with a very emotional topic, who would be best for a tough negotiation, and who would be best for thinking outside the box. (Includes a survey for participants.)

B. …how to find out the "truth", even if the other person is reluctant to tell you.

Understand the critical elements of decision making and what might be getting in someone's way. Learn an extremely powerful tool to deal with "stalls", find out someone's position on a matter, get people to call you back, and neutralize past negative experiences. Also, learn how to capitalize on people's innate desire to help others.

7. How to get clients/colleagues to feel urgency and take action; How to probe **effectively for someone's underlying issues and motivating factors for action**

Learn questioning strategies to uncover the truth about where your client stands and the motivating factors for action. This is an extremely powerful technique to uncover the "real issues" in almost any situation. In selling it is instrumental to qualifying and "closing" or getting a decision. Understand when to give up. Learn how to "sell" on value, not cost. Learn how to arouse the emotions that lead to a decision, how to get someone to feel urgency so they take action. Understand why discussions and presentations filled with the features and benefits of "your standard product" have limited effectiveness, and what you should do instead.

8. **How to uncover potential deal "killers"**
   Typically, in technical environments, when an interesting problem surfaces we can't wait to solve it. Unfortunately, we often forget to ask about the associated business issues and they come back to haunt us as we attempt to get a decision. Sadly, these issues often arise at the end of the selling cycle after much effort has already been expended. We get stuck in the mode of having done lots of "un-paid consulting". These issues might include…Is there budget available to invest in the solution? Who are the people who will be making the decision? What if the solution requires change—are people able and willing to make the required changes? What if the solution impacts another department—will that be a problem? Learn what issues are often deal killers, how to ask about them early in the sales process and what to do if they exist.

9. **How to Negotiate Win-Win Outcomes**
   Often in the technical world, our tendency to see things as black or white gets in the way when negotiating hard issues. Learn how to apply win-win techniques and strategies. Understand how to deal with "no's" and stalls. Understand the drawbacks of positional negotiation. Learn the basics of principled negotiation and how to apply it to your world.

10. **How to Give an Effective Presentation and Come Away with a Decision**
    Learn what and how to present and why your "standard" company presentation may be costing you business. Understand how and when to use your technical knowledge, expertise and information. Participants learn a no pressure qualification/decision technique that works well in a technical environment. Identify and use your audiences' information processing styles.

11. **How to Communicate with More Confidence and Effectiveness**
    Inappropriate or ineffective communication can cause confusion, frustration, misinterpretation, inefficiency and delays in projects. Most technical professionals are good at talking about their issues, but not so good at listening to their colleague's and customer's issues! Participants learn probing techniques to get to the real issues and avoid confusion and misinterpretation. Learn how to say "No", how to reduce "unpaid consulting", how to address tough questions and objections, how to clarify ambiguous comments, how to deal with stalls and put-offs.

12. **How to deal with Irate Colleagues or Customers**
    Occasionally we find ourselves in situations where someone has become irate over an issue. This usually happens when reality doesn't meet their expectations. The situation is often perceived by us to be confrontational and instinct tells us to fight. Unless we are prepared, we will typically react with a variety of verbal responses, gestures and body language which often fuel the fire as opposed to minimizing it. Learn a 3-step process to diffuse these situations and effectively deal with irate colleagues or customers.

13. **How to Manage Expectations**
    People get upset when reality doesn't meet their expectations. Unfortunately, expectations are often poorly communicated. Learn a process for setting, communicating and managing expectations.

14. **Application**
    New outcomes require new actions. New actions require new skill development. Research shows that new skill development requires practice. In addition, the more similar the practice

situation is to real life, the more valuable it is. Understand applicability of various techniques through application in company and industry specific role-play scenarios. These can be customized to fit your world and represent specific situations which management would like to see practiced.

Course Format

The material is presented in a manner to facilitate the process of learning, from the initial phase of understanding (knowing) a concept, to the advanced phase of applying (owning) it. Much interaction is encouraged. Participants have an opportunity to discuss and practice specific techniques, strategize their own specific situations and participate in role-playing exercises that simulate realistic communication and selling situations. The training is customized for each client by incorporating specific industry examples to assist with the application process. Role playing of actual situations is included. Course materials are provided for each participant.

Course Length

This course is 3 days in length. (We can offer a shortened version; however, some content as well as time for application and practice, i.e. role-playing and strategizing exercises will be sacrificed.)

Sample Course Key Learning Points

1. Sales is a process and it needs definition
2. Opportunities must have business as well as technical qualification
3. Importance of relationships in selling
4. Diagnose before you prescribe
5. Probe with questions to uncover the ‘problem” (PAIN)
6. Sell a solution, not technical features and benefits
7. Why convincing (and arrogance) don’t work
8. Proactive selling vs. reactive selling
9. How to reduce time and resources spent chasing after opportunities
10. Opportunity qualification must include a business “fit”, not just a technical “fit”
11. How to differentiate yourselves from the competition
12. Why we do “un-paid consulting” and its consequences
13. People are different and we need to adjust our communications for those differences
14. How to build credibility and trust
15. How to get customers comfortable with you so they’ll open up
16. Understanding and identifying opportunities: needs, wants, problems, motivating factors for action
17. How to help customers discover they need your ideas, products, services, etc.
18. “Telling” isn’t selling!

19. How to separate a real opportunity from a resource drain.
20. How to be more comfortable and effective calling on decision makers higher up in the organization

Comments from Past Participants:

- "If you take only one course in the next 10 years, make sure it is this one!" *--Mike Chenery, Vice President for Advanced Product Engineering, Fujitsu Computer Products*
- "Class seemed perfectly tailored to our business. We learned a structured approach to business development that will be important for future business success." *--Sharon Kaplan, Sr. Vice President, Psomas*
- "The techniques described in this course are very pertinent to our conducting of project acquisition, development, delivery and daily interactions, externally and internally." *--Chenyang Xu, Member Technical Staff, Siemens Corporation*
- "I recommend this course to people like me, who have a technical background but little negotiation experience. It will help them in everyday relationships with colleagues, customers, suppliers, friends and family." *--Stephano Marica, Program Manager, Robert Bosch Corporation*
- "Sales & marketing is not just the product. You must understand how the human elements affect the sale." *--Mike Shirai, Production Project Manager, Honeywell*
- "This is truly a secret weapon if used effectively, and is one of the only methods that I have seen that really fosters a long lasting "win-win" customer relationship!" *--Brian Muehl, Sr. Sales Engineer, Multi-Contact USA*
- "Excellent…it adds structure to something that most engineers don't realize is a process that can be systematically followed with results." *--John Williams, Sales Engineer, TI*
- "This course helps you understand the complexity of the sales process and gives you the tools to be successful." *--Ed Greene, VP, Wahlco Inc.*

Most important: Our participants give the training very high marks (8.5-9.2 out of 10) and ask for more!!

Other Related Courses and Workshops from Morgan Training…

Effective Communication, Sales & Negotiation for the Technical Professional, Application Session – (1 day) – The focus is on skill refinement through review, reinforcement and application of the Basic Course material. Emphasis is provided on topics and in areas that are requested by the participants. Practice, using advanced role-plays and scenarios, is a significant portion of this course. Suggested timing is 3-6 months after the basic course.

Account Management Workshop – (1 day) - Learn account management best practices. Also, learn how to retain your customers, how to keep them happy, how to coordinate multiple sales activities and how to grow your accounts.

***Overcoming Objections Workshop*–** (1 day) - We identify the top objections, discuss applicable strategies and techniques, apply a process for handling and then work to come up with effective responses.

***Opportunity Strategizing Workshop*–** (1 day) - Participants will leave the training with an improved understanding of the probability of closing their Opportunities, the information needed to improve that probability, and the necessary actions/strategies to move their opportunities along through the "Morgan Consultative Sales Process". Provides great review and reinforcement of Morgan Training strategies and techniques.

***Prospecting Workshop*–** (1 day, with pre-training preparation) - We construct an effective "30 second commercial", role play conversations and then send people off to the phones to make actual prospecting calls! (We can include prospecting within existing accounts as well as new accounts and/or new industries, etc.) Preparation for this workshop involves working with a client representative to generate a company specific prospecting script. Our clients have experienced some remarkable results and participants leave with a more positive attitude toward prospecting.

***Territory Planning Workshop*–** (1 day) **-** Focus is on completion of a workable territory plan for the current year, including goals, strategies and required actions. Some pre-work is required.

***Trade Show Workshop*–** (1 day) **-** The focus is on application of the Morgan methodologies to maximize effectiveness at trade shows. (It's astonishing how much money companies waste at Trade Shows because they neglect essential preparation and focus.)

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