Greetings from Nashville, Tennessee. I'm Jack Aldridge, an enterprise account executive with Gartner. I've been with Gartner for seven years and my position responsibilities include consulting with C-level executives to develop and implement an effective, enterprise-wide strategy that maximizes the value delivered by Gartner's products and services, as well as account management. My advice to you is to sell a product or service you genuinely believe in. One of my favorite quotes is: 'Do the right things and great results will follow.' (Gene Hall)

Hi, I'm Bruce Knight and I've spent 33 years working for pharmaceutical companies. I began as a sales associate and worked my way up to district sales manager with Sanofi. My advice to you is to never push your products on a customer. Find out their challenges and needs and truly try to help them fill their needs. The five most important words in selling are: How may I help you? My favorite quote is: 'People are like ropes. If you push them, they go nowhere. But if you pull them along gently, they will follow you.' (Author unknown)
My name is Michelle McKenna and I'm a new business sales manager with Open Sky Data Systems in Kildare, Ireland. My position entails seeking opportunities for new business (customers and partners). I've worked in a variety of sales positions for 16 years. I'd like to share this bit of advice with you: 

*Understand your own values and drivers before applying to an organization – how will you be rewarded and recognized?* Here's a good quote for you: ‘A year from now you will wish you had started today.’ (Karen Lamb)
THE FOUNDATIONS: ‘ON THE GROUND’

Don’t make a sale, create a customer!

EYES ON ETHICS

Keep in mind the following ethical topics as you read through this chapter:

1. Reporting the details of sales encounters accurately.
2. Giving credit to another salesperson when leading a sales team.

INTRODUCTION

Everybody buys. Everybody sells. Everybody wants to feel satisfied and happy. But most people do not want to be ‘sold’ something. Let’s get this straight, this is a textbook about developing skills for successful selling and sales management, yet we are recognizing that people don’t like to be ‘sold’ stuff. Did you misread something? No, that’s correct! When people think about ‘being sold’ something, they associate that with being coerced, tricked, fooled, forced, pushed, or led into buying something that they don’t really need, want, or desire. That’s the bad rap that the sales profession may have earned decades ago, but it is not successful selling in today’s modern business world.

Successful selling requires you to understand your customer’s and prospective customer’s needs before you begin any selling activities. There are new rules in selling now that include honesty and integrity, trustworthiness and dedication, and fulfilling the real needs of prospects and customers. Sales ethics must be applied to ensure honesty, responsibility, and fairness in contemporary selling. That’s what we’ll address in this first chapter, as well as throughout the rest of this book. Let’s get started.

MODERN SELLING

Today’s modern selling still follows an ordered process which is aligned with the sales funnel (also called ‘sales cycle’), which is a graphic that shows that many prospective buyers enter the sales cycle as sales leads; fewer of these progress to prospects once their needs/wants are qualified; and even a smaller number convert to customers once they make the buying commitment (see Figure 1.1). We’ll examine the sales funnel more closely in Chapter 4. In addition, we’ll overview the stages of the selling process later in this chapter and cover each of them in great depth throughout the chapters of this book. Today’s selling process is enabled by digital tools and techniques that make the progression much more efficient, effective, and satisfying for both the buyer and the seller. Digital technology not only enables salespeople to more precisely target prospective buyers, but it empowers those buyers with information and education so that they remain in the driver’s seat. Indeed, the modern selling process has evolved over the decades into a rewarding and fulfilling activity for all parties involved.
Understanding the importance of relationships in selling

Successful selling is not about what is sold or bought, it’s about satisfying people’s needs, wants, and desires. Selling is about solving people’s problems. They aren’t likely to let you do that unless you develop a good relationship with them and earn their trust. If you truly want to be a part of the problem-solving team, then you have to accept the problems of your customers or your prospective customers (also called ‘prospects’) as your problems. So, in essence, this is a book about how to communicate and really connect with other people, earn their respect and trust, and help to solve their problems by satisfying their needs, wants, and desires. Keep in mind that only relationships built in an ethical manner, with strong integrity will become productive and long term. We’ll address the crucial topic of ethics in greater detail later in this chapter, as well as throughout the entire book, but first, let’s explore the origins of selling.

Think back to the old days before the invention of modern machinery, communications systems, and modes of transportation beyond horses – that’s when selling actually began. Selling started in the form of bartering, where one entity would produce some goods or services of value and would exchange those for the valuable goods or services generated by another entity. These bartering exchanges would satisfy the needs or wants of each party and in the end, the problems of all of the entities would be solved. In those early days, all transactions occurred face to face, likely with
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the reputations of each individual well established and known by all who engaged in buying and selling exchanges. Back then, if you didn’t keep your word, nobody would trade with you. Thus, buying and selling began with the best intentions and integrity. Although our modern world has transformed the simple bartering exchange process, successful selling remains rooted in strong moral convictions and ethical practices.

Confident salesperson

Today’s selling is aided by sophisticated databases and analytical tools to help salespeople zero in on those prospective buyers who have a need, want, or problem with which the salesperson can assist. Digital, mobile, text, and social media have led many people to believe that in-person selling is passé – that personal contact is an antiquated notion. However, this is far from the truth. Person-to-person selling puts a friendly, human face on today’s digital business world. Think of it this way: a company may create the most brilliant marketing campaign, the cleverest advertisements, the catchiest tweets, and a ‘wow’ of a website to sell its excellent, need-satisfying products and services, but to land that client account or sell those products or services, its salespeople
must come out from behind their desks or laptops and engage with real human beings on a meaningful level. That’s where personal selling kicks in.

**Personal selling** is the interpersonal communication between sellers and buyers or prospective buyers in the exchange of products, services, or something of value, to the mutual benefit of both parties. Personal selling is a feature of the traditional promotional encounter which may take place face to face, by telephone, or via digital channels, such as email, social media, and online conferencing. Some people stereotypically think of personal selling as ‘the art of persuading people to buy.’ While persuasion indeed is an important aspect of selling, it does not always lead to mutually satisfying relationships in the long run. Unfortunately, in the past, some overzealous salespeople have used their persuasive talents to be able to ‘make a sale’ in order to reach a designated sales quota determined by their sales manager. Those situations frequently lead to dissatisfied customers with zero repeat sales potential. Salespeople who are adept at convincing prospects to buy given products/services will only achieve long-term successful customer relationships if they ensure that the products/services being purchased will truly satisfy their customers’ needs/wants and solve their problems. Thus, while the ability to persuade is a good skill for salespeople to develop, it can be misused and detrimental when salespeople lack integrity.

The golden rule in selling today is: *Don’t make a sale, create a customer!* Just think about what this saying implies – a sale is just one transaction, but a customer, once created, will potentially purchase from you and your company many times over the years, and if earned, become brand loyal to your company for a lifetime of patronage. **Transactional selling**, which is a form of selling that focuses solely on completing a deal, is rarely used in today’s business world. Rather, **relationship selling**, which are those activities that aim to develop and nurture mutually satisfying relationships with customers that last a lifetime, is commonly used. Many companies today go beyond building relationships to providing consulting services and forming strategic partnerships with some of their
customers via salespeople, providing additional, valuable knowledge and assistance to address specific business needs. This type of relationship selling is called consultative selling or partnership selling, where salespeople are focused on selling long-term value and creating long-term relationships with each prospect and customer as opposed to providing products and services. Thus, the goal of modern selling is to build lifetime relationships and partnerships with customers. How do salespeople achieve this goal? By providing their prospects and customers with something of value or worth.

In a culture of infinite choices and fierce competition vying for a buyer’s commitment, salespeople must provide substantial value to their prospects and customers to earn their patronage. Value is the relative worth, utility, or importance of something compared to its cost of acquisition. Value may be offered in different ways, such as providing valuable information, training, serving the customer after the sale, or via the need-satisfying product/service itself. A great example of need-satisfying products are those of Apple, Inc., where many people anxiously await each new version of its innovative products and are quick to buy the latest and greatest technology, regardless of the price. Apple’s Steve Jobs embraces this as he describes his company’s mission as ‘creating products that unleash human potential.’

One way or another, salespeople must provide value to their prospects and customers to ensure their satisfaction and cultivate long-term relationships. As such, ethics are fundamental throughout the entire relationship-building and selling processes. Let’s now delve into the topic of ethics in selling.

Employing ethical behavior in selling

The first thing that all salespeople must ‘sell’ is themselves. Simply put, people will not conduct business with people they do not like or trust. Thus, earning the respect and trust of prospective customers is critical to being able to successfully carry out any type of selling activity. There are four key fundamentals of trust:

1. Capability – what are you good at?
2. Dependability – will you meet your commitments and keep your promises?
3. Integrity – will you behave virtuously?
4. Intimacy – how well do I know you?

How can you earn the respect and trust of your prospects or customers? Building trust begins with salespeople believing in their respective company and what it is offering. In addition, you must possess genuine and authentic compassion for your prospects and customers, and sincerely want to help solve their problems. To build trust, salespeople may employ the following strategies:

- Be yourself and treat others as you want to be treated.
- Establish credibility to enable your prospect to be comfortable with you.
- Provide accurate product/service data with complete clarity and transparency.
- Share testimonials from previous customers.
- Project confidence in what you are selling.
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➢ Use positive body language when communicating, especially good eye contact, nodding to show understanding, and smiling.
➢ Ask open-ended questions to enable customers to provide detailed answers.
➢ Carefully listen and respond to consumer needs, wants, and problems.
➢ Provide specific deadlines to demonstrate your dependability to meet expectations.
➢ Do something unexpected, such as offering additional assistance or performing some thoughtful and helpful action.
➢ Mention minor and carefully selected negatives associated with the product/service that may be transformed into positives.

As previously mentioned, some salespeople may be under pressure from their sales managers to close deals by using any means necessary. This can drive some salespeople to make poor decisions and abandon their ethical principles when engaging with prospects. This is never appropriate and will always result in a ‘lose-lose’ scenario. Numerous research studies have shown that salesperson stress related to ongoing ethical dilemmas decreases job satisfaction and is a leading cause of employee turnover, burnout, and fatigue.7 Thus, there are negative consequences when salespeople feel forced to behave in a manner that conflicts with their ethical values. For this reason, it is best for salespeople to always live and work by the highest ethical standards. Research shows that businesses with high ethical standards report having higher customer satisfaction, greater customer retention, and more active referrals.8 The good news is that most companies strive to create a culture of ethical values and to establish realistic sales expectations to positively motivate salespeople without undue stress.9
Ethical selling includes a number of different practices that salespeople should exercise on a regular basis. Those ethical practices include:10

- Offering truthful information and fair competitive comparisons – speaking honestly about your products and competitor offerings while being careful not to badmouth competitors.
- Handling objections with honesty and sincerity – never overselling your product/service features by promising results that are not feasible, and offering to investigate those questions that you cannot immediately answer.
- Following through on promises and commitments made – giving top priority to honoring commitments in a timely manner and keeping your word on all issues.
- Being accountable for any problems that arise – quickly and honestly taking responsibility for issues and offering potential solutions to remedy a situation.
- Maintaining an ethical-selling based organizational culture – exhibiting ethical behavior on an ongoing basis to all people throughout a company fosters a positive environment.

Thus, all selling necessitates ethical behavior, regardless of who your customers are, the manner by which you’re conducting your selling activities, or the channels you are using to interact with prospective customers. Now let’s explore the different ways that selling activities may occur.

Exploring different methods of selling

As Figure 1.2 shows, there are two main sales channels – direct and indirect. Direct channels do not include the use of middlemen or any third party such as wholesalers, distributors, or retailers, while indirect channels do use a network of channel partners when selling products/services to consumers. Furthermore, companies may sell to other businesses (formal entities, organizations, associations, or groups who purchase products for further production, use in business operations, or for resale) which is commonly referred to as business-to-business (B2B) selling, or they may sell to final consumers (individuals who purchase products for personal, family, or household consumption) which is commonly called business-to-consumer (B2C) selling. Both B2B and B2C selling may use either direct or indirect channels.

Selling activities typically occur via three different methods – direct, outside, or inside. Let’s examine each.

Direct selling is selling products/services directly to consumers via salespeople in non-retail and nontraditional settings. Nontraditional settings include single-level direct sales such as those typically performed one-on-one through in-person or door-to-door presentations, online meetings, or catalogs, host or party-plan selling, or multi-level marketing (MLM), such as network marketing where salespeople, usually called ‘distributors’, are often required to recruit other salespeople, and compensation is associated with their recruiting results.11 It is important to note that MLM direct selling is not the same as pyramid schemes, which are unethical and illegal. In addition, direct
selling is not the same as direct marketing since direct selling utilizes salespeople to interact with prospects and customers, whereas direct marketing typically does not. Direct selling may be used for both B2B and B2C selling. Some examples of direct selling are Amway, Avon, Amore Pacific, Herbalife, NuSkin, Mary Kay Cosmetics, Arbonne, and Silpada. For the latest information on direct selling, check out Direct Selling News at www.directsellingnews.com.

Outside selling is where salespeople meet with prospects face to face at business meetings, trade shows, conferences, industry events, or other locations. Outside selling is also called ‘field sales’ (or ‘channel sales’ when indirect channels are used) because salespeople must leave their offices and go out in the field in order to conduct meetings or sales calls with prospects. Often, outside salespeople earn more than their inside counterparts due to the fact that they bring more experience to the selling situation; however, that depends on the company and industry, as well as whether they earn commissions or bonuses related to reaching or surpassing their specified sales targets or quotas.12
Inside selling is where salespeople locate potential customers and guide them through the sales process remotely, instead of face to face. Inside salespeople typically conduct selling activities over the telephone, via email, or by virtual meetings. In the past, inside salespeople have been responsible for selling uncomplicated products; however, today inside selling is more prevalent in many B2B selling situations, as well as in conducting high-ticket B2C transactions. Inside salespeople must command in-depth knowledge of the products/services they are selling since they must be able to explain the functionality and value of their products/services without the benefit of being able to provide an in-person demonstration.

In the past, field salespeople and inside salespeople have traditionally had their own domains, but in today’s business world, with rising costs associated with outside selling, coupled with advances in digital technology, the lines between these two selling approaches have blurred. In today’s modern world, more field salespeople are interacting with prospects and customers remotely than ever before, and inside salespeople are now serving larger customers with more complex needs. The digital revolution is causing disruption in the use of selling methods in the following three ways:

1. The ease and convenience of digital platforms are enticing consumers to buy via no-cost digital and inside sales methods instead of from outside selling approaches which are typically more expensive.
2. Digital media tools which provide consumers with multiple alternatives for purchasing needed products/services are continually evolving and have become ubiquitous.
3. Data analytics platforms are providing more valuable information that is fueling the selling activities and strategic decisions of both inside and outside salespeople, and sales managers.

Many companies are embracing advances in digital sales tools that enable inside and outside sales collaboration that promotes team rather than individual selling opportunities. Team selling is a collaborative sales strategy where two or more members work together to achieve buying commitments. Examples of how team selling may be used are:

- Having two or more salespeople working together on a particular prospective account.
- Inviting a sales specialist from another department within the company to address specific concerns a client may have, such as questions pertaining to manufacturing, technical specifications, or customer service.
- Building a formal cross-functional team with representatives from sales, marketing, customer service, and senior leadership to collaborate throughout the sales cycle.

Traditionally, the sales function of many companies has created a culture of competition where salespeople are often pitted against one another, with their deal statistics and rankings publicly displayed for everyone in their respective company to see.
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This competitive selling environment often produced ‘star’ salespeople who would always drive themselves to win sales competitions among their fellow sales associates. Unfortunately, often these solitary star salespeople would demonstrate ‘lone-wolf tendencies’ in that they would rarely engage or cooperate with others; dedicated little time and energy to developing interpersonal relationships; and believed that their accomplishments were based solely on individual initiatives and efforts.¹⁷ Just like in the animal world, no wolf can survive for long in the wild when it’s separated from its pack. In today’s sales environment, the solo salesperson struggles to succeed and typically will only achieve mediocre results.¹⁸ Although the spirit of competition has its merits in other areas, in sales, team selling has been found to be a more powerful sales strategy than individual selling. Team selling offers many key benefits, including:¹⁹

- Gaining different perspectives and ideas.
- Acquiring contagious energy and motivation.
- Sharing responsibility and accountability, thus feeling less pressure individually.
- Possessing the ability to be at multiple places at one time by dividing and conquering.
- Obtaining unparalleled personal growth, lifelong learning, and skills development.
- Having others to share the victory with.
- Achieving greater selling success.

In order to enjoy the benefits associated with team selling, team members must be carefully selected. Table 1.1 provides some tips to guide you in selecting team members to achieve successful team selling. Later, in Chapter 11, we’ll discuss how sales managers can promote a ‘we’ mentality by employing a ‘servant leadership’ style.
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**Table 1.1 Team member selection guidelines**

- Possesses good chemistry with other team members
- Shares core values with other team members
- Has an agreed upon team leader to preside over meetings and maintain order
- Has an agreed upon process for resolving potential conflict
- Demonstrates effective communication and transparency
- Shows flexibility and adaptability
- Is reliable and has good follow-through on commitments and promises
- Has a willingness to collaborate
- Possesses effective listening skills
- Is a good team player who possesses a ‘we’ mentality
- Is knowledgeable
- Applies relevant experience
- Brings unique, value-added capability to the team
- Is persistent in achieving objectives
- Has an excellent work ethic
- Is passionate about the team’s common goal


All salespeople, regardless of whether they are selling solo or on a team, or via outside, inside, or direct methods, rely on their respective company’s customer relationship management (CRM) system, which is an integrated system that delivers a single-source transactional database of up-to-date customer information throughout an entire organization to maximize the total value of the customer relationship. We’ll discuss CRM in greater detail in the next chapter; however, for now, know that this system provides relevant information on prospects and customers to enable salespeople to build stronger relationships with them, understand their needs and wants, and solve their problems by providing needed products/services. CRM tools and data availability have leveled the playing field for all selling methods as sales metrics can be compared among all methods. Interpreting CRM data can reveal strategic insights that lead to sales-enablement programs and better business results. Sales analytics and sales enablement, which will be more specifically addressed in Chapter 13, are driving the decisions of salespeople in each of the ordered stages of the selling process. Let’s now discuss the selling process and overview each of its stages.

**THE SELLING PROCESS**

Successful selling is typically achieved following a sequential process, with each stage contributing to meeting customers’ needs/wants and solving their problems. The selling
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process progresses in tandem with the customer-buying journey, where the first step is that customers recognize an unfulfilled need/want or problem that needs to be solved. The buyer journey will be discussed in detail in Chapter 2. Keep in mind that the goal of selling today is not to complete as many transactions as possible, but rather, to establish long-term customer relationships. Thus, the selling process continues after a transaction is made.

The Selling Process

- Recruiting, training, motivating, budgeting, forecasting, tracking, and analyzing
  
  **Sales Management**
  **Providing ongoing sales leadership, support, and coaching** [CH. 11, 12, & 13]

- Following up to cultivate and manage relationships [CH.10]
- Overcoming objections & closing the sale [CH. 9]
- Negotiating and managing conflict [CH. 8]
- Delivering sales presentations and using storytelling [CH. 7]
- Listening to the customer and determining willingness to buy [CH. 6]
- Approaching and communicating [CH. 5]
- Networking and prospecting [CH. 4]
- Researching, preparing, and planning strategically
  
  **The Foundations**
  **Acquiring and sharing relevant insight on prospective customers** [CH. 2 & 3]

**Figure 1.3. Stages of the selling process**
Overviewing the stages of the selling process

As Figure 1.3 reveals, the selling process begins by forming a foundation of knowledge from which salespeople can better understand themselves, their company and products/services, and most importantly, the needs/wants/problems of prospects and customers. Successful selling requires an understanding of the dynamic selling situation within which salespeople must operate. Empowered with that knowledge and driven by strategic planning and goals, salespeople begin the ordered stages of selling which are prospecting, approaching, listening and determining willingness to buy, presenting, overcoming objections and negotiating, closing the sale, and following up. Let’s briefly examine each of these seven stages:

**Stage 1 – Prospecting:** This stage involves networking and generating leads with people who may have an interest in the products/services you are offering. In prospecting, salespeople are determining whether there’s a fit and a mutually beneficial relationship that’s worth pursuing as it may lead to an opportunity to deliver value and earn a buying commitment. The objective in this stage is qualifying leads and cultivating customers through the sales funnel.

**Stage 2 – Approaching:** The approach stage is where salespeople make initial contact with their prospective customers. This is the meet-and-greet stage of the selling process where the goal is to make a good first impression, establish rapport, build credibility and attain buyer trust, practice good professional etiquette, and communicate effectively to ensure that there is complete understanding between salespeople and customers or prospective buyers. The approach stage of the selling process requires salespeople to master ‘soft skills’ in order to foster strong business relationships with prospects and customers.

**Stage 3 – Listening and determining willingness to buy:** This stage of the selling process is often called the needs discovery conversation (NDC) or ‘interview’ stage and includes asking effective questions, listening actively and proactively, understanding the buyer and their journey, and determining the buyer’s willingness to buy (WTB). WTB is a framework that uses a minimally intrusive process that puts potential customers at ease, while the salesperson assists them in self-diagnosis of whether they are ready and able to make a buying decision at that time. If they are, the salesperson would move onto the next stage in the selling process; however, if not, then the potential buyer and the salesperson each decide how to proceed. The salesperson may consider moving onto other sales opportunities that are more likely to come to a buying decision.

**Stage 4 – Delivering the sales presentation:** During this stage, salespeople will deliver sales presentations to inform and persuade their prospects to move forward in the sales cycle, and eventually close deals. Creating sales presentations necessitates that different approaches and techniques be used to command the prospect’s attention and pitch with passion, such as the effective use of storytelling.
sales presentations comprise a distinct stage in the selling process, in reality they begin with planning and preparing based on prospect research and extend from the moment the appointment is made to the moment the buying decision is made.

**Stage 5 – Managing conflict and negotiating:** During this stage, conflict or disagreement will likely occur during the selling conversation, along with the need to negotiate or bargain to arrive at a mutually satisfactory sales outcome. Often, buyers raise questions while negotiating with the salesperson. The best salespeople will welcome buyer questions and seek to explore potential areas of conflict. Of course, salespeople must anticipate and be prepared to successfully manage any conflict that may arise during this stage in order to successfully move to the next stage of the selling process.

**Stage 6 – Overcoming objections and closing the sale:** This stage pertains to obtaining commitments, which may include decisions to advance the sale such as asking for a call-back meeting or to begin the customer relationship by agreeing to buy. Salespeople will encounter both questions and objections from the customer or prospect and they must fully answer each question and overcome each objection in order to continue to earn the buyer's trust. Earning trust during each stage of the sales cycle is needed in order to obtain the buyer's commitment to buy. Based on a thorough understanding of each buyer's unique problem and situation, a particular strategy for closing the sale will be selected and implemented.

**Stage 7 – Following up:** This stage addresses those activities that are performed after a sale is made, including fulfillment, customer service, and customer relationship management. This last stage of the selling process is crucial to ensure future success and repeat business for your company. Salespeople should conduct follow-up activities with a customer retention focus to strengthen customer relationships and drive future business opportunities.

Most sales transactions tend to move through these seven stages, whether you’re consciously aware of it or not, with more complex B2B transactions typically taking longer and involving more people to progress forward than some simple B2C transactions. For example, most consumers will conduct extensive research on automobiles before they decide to visit a car dealership. However, when they do visit a dealership, they signal their interest in buying a vehicle by strolling through the lot or entering its showroom. Salespeople are there to assist prospects in acquiring additional insight and gathering specific information. When salespeople approach prospect to offer assistance, they are able to gather information to understand the prospect's needs and wants and may begin thinking of potential vehicles for that person. By asking the salesperson whether there are any special features, options, accessories, or deals associated with select models of vehicles, the prospect begins evaluating and contemplating making concessions. Some of the prospect's questions may communicate hesitations to move forward with buying a new car. Salespeople will do their best to help their prospects overcome their buying
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objections. Perhaps the prospect needs more time to decide and opts to leave the dealership. However, if the prospect is willing to make an offer to buy at that time, the salesperson will likely counter. Alternatively, the salesperson will make an offer to the prospect, who will likely negotiate. If the two can reach a mutually satisfying agreement regarding the terms of the sale, then the discussion will culminate in a commitment to buy.

After the paperwork is completed and the customer drives off of the lot in a new vehicle, the salesperson will likely make follow-up calls and send emails and/or letters. The purpose for this is to thank the customer for the sale and to ensure buyer satisfaction. Typically, the dealership service department will also contact the customer with an invitation to take advantage of free car washes, oil changes, and other relevant services that it provides. At this point, the customer has completed all seven stages of the selling process. In more complex buying situations, several call-backs may be required along with consultations with other people or associates prior to reaching a buying decision. Salespeople are typically responsible for educating prospective buyers about products/
services, building relationships, closing deals, ensuring ongoing customer satisfaction, and performing other related duties that directly impact a company’s sales revenues. Let’s now examine the different roles that salespeople may perform in greater detail.

Examining the functions in selling

The specific selling activities performed by salespeople vary depending on the salesperson’s position, company, and industry. In addition, the roles vary greatly depending on what they are selling, to whom they are selling, and where they are selling. Those people who perform the relevant selling activities may have many different titles, such as sales associate, sales representative, agent, broker, sales manager, district manager, account executive, sales consultant, customer development executive, business development representative, and more. Since there is no standardized system for titling the various sales positions, it is not unusual to find different position titles given to similar selling functions among different companies. However, all selling functions may be placed in at least one of five broad categories:  

- Sales representatives – typically entry-level positions that engage one on one with prospective customers.
- Sales management – management positions normally supervise salespeople and sales teams, and often oversee existing client accounts. Sales managers are usually responsible for recruiting, training, and leading salespeople (which we’ll explore in Chapter 11); budgeting and sales forecasting activities (which we’ll examine in Chapter 12); and performing sales analytics and tracking productivity (which we’ll investigate in Chapter 13).
- Administrative sales positions – these positions typically provide services that support salespeople or sales teams, and may include performing clerical functions, analyzing sales data, and acting as a liaison between sales and marketing.
- Account executives and advisors – these positions are associated with account management and tend to require more complex duties, such as establishing relationships with high-value new client accounts, and serving the needs of existing key client accounts by advising, coaching, and providing ongoing customer service.
- Executive-level management – the salespeople in these top-level positions typically hold titles such as ‘director’ who supervise groups of managers, or ‘vice president’ who supervise the directors. At this level, they are responsible for strategic planning and achieving the long-term goals of the company.

Depending on the sales function and type of sales-related position, careers in selling normally require a wide variety of skills, including both technical skills (sales training, strategic planning, technology, analytical, and financial) and soft skills (communication, active listening, rapport building, the ability to create an emotional response, and presentation skills). In addition, ‘meta skills’ (which include communications, critical thinking, interpersonal communications, leadership, and self-management measures, such as taking initiative, managing time, working with others, and mastering the ability to sell ideas) are needed in order to be successful in a sales career.
A career in sales offers several key benefits, including:

- High earning potential, with some commission-based positions offering unlimited income potential.
- Flexibility in daily schedules, especially in field sales positions.
- Job security, since salespeople are typically the last to be cut when business is declining.
- A competitive environment with challenges to excel and win valuable bonuses and awards.
- The opportunity for self-actualization generated by the emotions felt when salespeople are able to help others.

The sales profession has now become a dynamic and exciting field in which many people find great success and happiness in their career once they decide to pursue it. Keep this in mind as you read this book and explore the wonderful world of modern selling. (To learn more about the various career options in sales, check out Appendix B at the back of this book.)

Selling has always and will always be a numbers game. Thus, individuals who like engaging with both people and data are well suited to a career in selling. In the final section of this chapter, we’ll overview some of the key metrics associated with selling.

**MONITORING METRICS**

Monitoring metrics

Each company has different sales metrics that it uses to measure success. Some metrics are:

- Call totals or averages – number of calls per day, month, quarter, etc., placed to specific prospects or customers.
- Number or percentage of total calls made by contact type (in-person, telephone, virtual, or email).
- Measurement of what content was shown or discussed and how much time was spent on a certain message. When sales calls are completed digitally, these items can be more precisely measured.
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- Number of individual or team engagements with customers or prospects.
- Number of events, speaking engagements, or programs conducted and the number of attendees or participants at each.
- Number of suggestions offered by the marketing department and the number or percentage of those suggestions implemented by the salespeople.

Advances in technology have not only reshaped the way selling is occurring in today’s world, but also the metrics by which sales activities are tracked and measured. Technology effectively enables manual processes to be automated, meaningful data to be captured and maintained, sales engagements to be personalized, collaboration between departments and salespeople to be improved, sales talent to be developed and coached, and much more. Today, more consumers are comfortable accessing information and purchasing products/services digitally than ever before. This trend will likely continue in the future as consumers are able to access more digital options to help them satisfy their needs and wants, and solve their problems.

Digital disruption doesn’t mean that there won’t be a role for salespeople; rather, those roles will continue to evolve and be shaped in response to the desires of their customers and the latest digital advances. Consumers, industries, companies, and life in general are always changing. To achieve success in selling, salespeople and sales managers need to stay abreast of those changes, be flexible, adapt when needed, and always keep in mind the end goal of selling: establishing ethical, long-term relationships with customers by providing real value to satisfy their needs/wants and solve their problems. This book was written with that goal in mind and to help you become successful in selling. Remember, everyone sells something even if they don’t pursue a formal career in sales.

CHAPTER SUMMARY

- Note that building good relationships with customers and prospective buyers is more important than making any sale.
- Position yourself as part of the customer or prospect’s problem-solving team.
- As a salesperson, strive to work well in a team-selling environment.
- Follow the seven-step selling process routinely as all steps are required for success.
- Remember that technical skills, soft skills, and 'meta' skills are all required for a successful career in selling.
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KEY TERMS

Business-to-business (B2B) selling
Business-to-consumer (B2C) selling
Consultative selling
Customer relationship management (CRM)
Direct channels
Direct selling
Indirect channels
Inside selling
Outside selling
Personal selling
Relationship selling
Sales funnel
Team selling
Transactional selling
Value

REVIEW QUESTIONS

1. While it is important to meet sales quotas, it is not enough to be considered successful in selling. What else do salespeople need to do in order to remain successful in the long term?

2. Describe two different ways that salespeople can provide substantial value to their prospects and customers.

3. Identify three strategies that salespeople can employ to build trust with prospects and customers.

4. Compare and contrast outside selling and inside selling.

5. Describe the benefits that come from team selling as opposed to selling by individual salespeople.

6. Describe four personal characteristics that you believe are most important to consider when selecting salespeople to be on a sales team.

7. Identify and explain the seven steps in the selling process.

8. Name three job positions or functions typically represented in sales organizations. Which appeals to you the most? Why?

9. Identify and provide examples of the three types of skills required to be successful in a career in selling.

10. What benefits are often realized for those making a career in sales?

ETHICS IN ACTION

1. Patrick Muer is a salesman for a large pharmaceutical company. His sales territory was recently broadened when another salesperson left the company. Going forward, he is expected to meet a higher quota
that reflects the larger territory. He has also been challenged to bring in two new accounts by the end of the quarter from the area he has just been assigned. As the months progress, he realizes that there is no way that he can bring on two new accounts while managing his increased workload. He has noticed, however, that one account in the new territory has not been documented in the CRM system. He decides to enter this account as a new customer in CRM. Two months later, he is called to the sales director’s office to talk about this particular account. As it turns out, the director noticed that this ‘new’ account is actually an existing customer who changed the name of the company following a merger earlier that year. What should Patrick say when confronted with this information? What action, if any, should the sales director take regarding Patrick’s deception?

2. Jeremy Brady has been a sales team leader for the past five years at an automobile parts superstore. He has always been effusive with praise and recognition for the team members that work with him in opening new accounts. At his last performance review, Jeremy was told by the CEO that while his team members enjoy working with him, the executive team has been disappointed in his lack of individual achievement in closing new accounts. The truth is that Jeremy invests much of his time working with younger salespeople to close and service new accounts. To remedy this misperception, Jeremy claims personal credit for closing the next two new accounts. This behavior shocks and disappoints the rest of the sales team and launches many rumors within the organization. What could Jeremy have done differently when confronted by the CEO? What should Jeremy do now to resolve the rumors and address the dissatisfaction of his team members?

EXERCISE

Everyone buys. Everyone sells. You don’t have to be called a salesperson to partake in selling activities. Create a journal for the upcoming week and record each time you engage in buying or selling activities. Keep in mind that the concept of selling includes any time you communicate with other people to provide value that helps to solve their problems by satisfying their needs, wants, and desires. Be sure to address each of the following in your weekly journal:

a. Location or method of buying or selling
b. People involved in the transaction or exchange
c. Type of value provided or purchased
d. A selling and/or buying goal for each transaction
e. Specific sales data that can be tracked and measured per transaction.
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READINGS AND RESOURCES


CASE STUDY: PHARMACEUTICAL SALES

*Note:* The names and locations used in this case study have been disguised for confidentiality purposes.

The pharmaceutical sales industry is large and diverse, employing thousands of sales representatives worldwide. Many of these sales reps have enjoyed a life-long career working for several different pharmaceutical companies in different capacities. One such pharmaceutical sales representative is Angela Carr. Angela has dedicated more than 25 years to working for three pharmaceutical companies. She began her pharmaceutical sales career straight out of college and worked as a sales rep for 12 years until she was promoted to a sales manager position. After a few years in her managerial post, she realized how much she missed the regular interaction with physicians, pharmacists, and the medical staff, so she returned to field sales.
INTRODUCING ETHICAL RELATIONSHIP SELLING

Angela’s current sales territory spans approximately 240 miles, encompasses nine cities, in two states, and includes 120 physician offices, 15 pharmacies, and three hospitals. Like most sales reps, Angela specializes in selling a particular type of pharmaceutical drug – in her case, it is the drug Botox. While Botox is sold for both cosmetic and therapeutic indications (treatment of migraines), Angela sells Botox Cosmetic only. She is responsible for providing her medical clients updates about Botox and for achieving her annual sales quotas by encouraging them to prescribe Botox to their patients.

As are most types of selling, pharmaceutical sales are all about relationship building. Regardless of the particular company the salesperson represents, pharmaceutical drug lines that they are selling, or the geographical region to which they are assigned, one thing has stayed constant: educating physicians and medical personnel about the latest pharmaceutical drugs available to most effectively treat the medical needs of their patients. That’s the value that pharmaceutical sales reps offer their clients. However, how pharmaceutical representatives serve their medical practitioner clients has changed greatly over the past few decades. In addition, the rules and regulations that govern pharmaceutical selling vary by country and are constantly changing.

When Angela first started her pharmaceutical sales career, there were limited regulations in place. In addition to regularly visiting her client’s medical offices, she was able to organize and host ‘dine and dash’ dinners, as well as fun events and activities at various sports arenas, circuses, and theme parks for her clients and their families. She was able to distribute free gifts and premiums (pens, hats, mugs, etc.) that included the brand name of the pharmaceutical drug she represented. However, over the years, much has changed. Pharmaceutical selling is now one of the most regulated industries, where reps can no longer leave a pen or notepad at a physician’s office if it contains a pharmaceutical brand name or logo.

Today, all pharmaceutical sales reps operate under strict ethical rules where they cannot discuss the clinical trials of a new drug in advance of the ‘official clinical approval.’ While there is a huge temptation to speak about the new indications, Angela cannot do so as it would be considered an ‘off-label’ discussion which could cause the pharmaceutical company and the sales rep to incur legal penalties, including substantial fines.

Angela may still host a speaker program dinner; however, her clients cannot bring a spouse or guest, and there are very strict rules in place regarding what the speaker is permitted to say, and also what they must say, about the given pharmaceutical drug. Speakers cannot minimize a side-effect or an adverse event of the drug in any way and they must address safety and indications, among other topics. Speakers must also disclose that they are being compensated for their presentation. If they say something incorrect or break any of the rules of ethics, the sales rep is obligated to interrupt the speaker, correct the dossier, and remind them publicly that they cannot comment on ‘off-label’ treatments and they must cover the safety issues associated with the pharmaceutical drug. At the conclusion of the speaker program, the sales rep must complete a program-closeout questionnaire and attest to all of the above issues.

Working as a pharmaceutical representative is challenging, but it is highly rewarding and offers a number of perks. Most sales reps work from their home, set their own working hours, drive a company car when calling on the doctors’ offices and pharmacies in their
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respective sales territory, are paid a salary, plus earn commission and bonuses, and sell life-saving or life-improving products. So, if you're seeking an enjoyable sales career where you are making a real difference to the lives of others, consider becoming a pharmaceutical sales representative!

Case questions:

1. What is the primary value pharmaceutical sales representatives give to their clients? How do they provide this value?
2. Explain some of the changes that have occurred in how Angela has carried out her pharmaceutical selling activities over the decades?
3. Why do you think ethics plays a more stringent role when selling pharmaceutical drugs than it does when selling products or services for most other sales industries?

NOTES

9. Kristen Bell DeTienne, Bradley R. Agle, Carrolyn McMurdie Sands, Alice Aleo and Alberto Aleo, ‘Fostering an Ethical Culture on Your Sales Team’ (June 20, 2019),
INTRODUCING ETHICAL RELATIONSHIP SELLING


13. Ibid.


15. Ibid.


