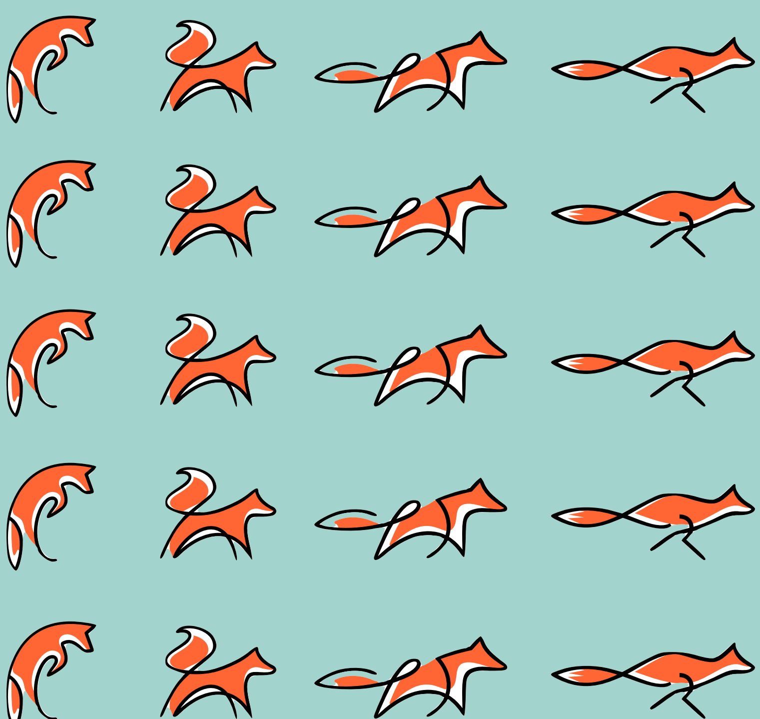
Insight Fox

SELLING SMARTER IN A HYBRID WORLD

By David Lambert & Joshua Davies



InsightFox

Use the fox to help you find insights inside the box.

By David Lambert & Joshua Davies

From David:
To my Mum, who has no idea how much I still need her.

From Joshua:
*For my Mom & Dad. Because they’re **awesome**.*

The world has changed

In 2019, just prior to the Covid pandemic, McKinsey started surveying the role of remote sales and digital self-service in the buying journey, as compared to traditional (face-to-face selling).

In September 2024, they declared:

"Amid today's economic uncertainty, the B2B landscape is undergoing significant transformation".

We're not sure that we can remember a time, in recent memory, when the B2B landscape was NOT "undergoing significant transformation".

Undoubtedly, hybrid selling (the mix of digital, virtual and face-to-face channels), presents opportunities to access new markets, wow with digital savvy, and run tighter, more consistent, efficient and predictable buyer engagement processes.

Despite the doubling of different channels used by B2B buyers, from five in 2016 to ten by 2021, McKinsey tell us, that what they call the "rule of thirds", applies for sales interactions throughout all stages of the buying process; for all types of decision-maker; and for all industries and geographies:

"At any given stage of the buying journey, one-third of customers hope for in-person interactions, one-third want remote communications, and one-third prefer digital self-serve options.

The rule of thirds holds true across all geographies, industries, and company sizes, all types of buying occasions from new to repeat purchases, and across high and low-value purchases." [1]

[1] https://www.mckinsey.com/capabilities/growth-marketing-and-sales/our-insights/five-fundamental-truths-how-b2b-winners-keep-growing

The good news then, is that for now at least, people still have a role to play whether in-person or remotely. But challenges still exist when combining face-to-face and online selling: rapport can be more difficult to establish; maintaining attention is harder; more energy is needed; greater planning is required; and, worst of all for sales professionals, it is easier for buyers to postpone and cancel when they can do it without looking you in the eye.

Our goal with this ebook is to be two-thirds helpful!

We will not touch on digital self-service sales, but we will introduce selling tools and knowledge to help you walk confidently in the brave new world of hybrid selling.

Our guides on this journey are **David** and **Joshua**. *Hello*.

David Lambert is co-author of *Smarter Selling* [(Financial Times - Pearson)]. A keen observer of human behavior, David has spent the last 25 years helping companies build loyalty with clients through building trusted relationships. Here he focuses on how to apply proven tools and approaches in *Smarter Selling* to build trust virtually.

Joshua Davies is a conversation architect and author of *Radically Remote*. A leading advocate of virtual facilitation, Joshua helps clients worldwide map persuasive conversations to maximize engagement and presence.

Let's begin.

A Road Map for the New World

Part 1: Brave new world

Part 2: Tools for the new world

Part 1:
Brave new world

1. On a changed and still changing landscape

"There are things known and there are things unknown, and in between are the doors of perception." — Aldous Huxley

Digital selling, which accelerated as a response to the pandemic, is projected to become the leading sales approach over the next few years, due to changes in buyer behavior, the growth of work-from-home and a focus on cutting business costs.

HubSpot reported in their 2024 Sales Trends Report that 96% of prospects have done their own research before speaking with a rep.

Today's buyers have clear expectations: they increasingly want more options, greater convenience, and a personalized experience. They desire a seamless buying experience from their first look online, through their various contacts with the sales organization, through to purchase and after-sales service.

Top performers and top-performing organizations are working tirelessly to adapt to this ever-evolving landscape. If you're not, you risk getting left behind.

This ebook aims to highlight the changes taking place, before our eyes, and to highlight how we, as sales professionals, can adapt, survive and thrive in the brave new world.

New possibilities, similar challenges

Digital platforms have enabled sales professionals to reach a broader audience, transcending geographical limitations.

Added to that, emerging AI technologies offer untold possibilities to improve sales productivity. HubSpot reports that AI tools can save sales professionals two hours each day[2]. Time, they say, can be added to the two hours each day that are spent actually selling.

They go on to say that:

"Relationship-building and connection are more important than ever."

It seems that while technology can help get the job done, buyers still need the human touch to conclude the purchase – especially for complex and high-cost purchases.

In an earlier version of this ebook we quoted LinkedIn Learning's 2020 survey[3] that highlighted less responsive buyers, longer sales cycles and spending freezes.

[2] The State of AI In Sales [New 2023 Data] (hubspot.com)
[3] https://business.linkedin.com/sales-solutions/b2b-sales-strategy-guides/the-state-of-sales-2020-report

Skip to 2024 and we have HubSpot telling us that the key challenges facing sales teams are:

1. Inflation
2. Standing out from the competition
3. Lack of high-quality leads
4. Reaching decision-makers
5. Longer deal cycles

Meanwhile, the Pavilion/Ebsta B2B Sales Benchmark Report 2024[4], of 530 companies, reports that in 2024, a massive 69% of sales reps missed quota.

This study goes deeper, analyzing the impact of contact between the buying and selling organizations. We all know that B2B decision-making is complex involving multiple influencers and stakeholders. The Pavilion/Ebsta study reported that successful deals involve 9 contacts engaged early in the sales process before the solution is presented, while lost deals have just two contacts on average before a solution is presented.

The landscape changes - but the importance of building the right relationships with the right people remains. HubSpot's 2024 report reinforces this, telling us that 82% of sales professionals identify building relationships and connecting with people as the most important part of selling.

Just as the Challenger Sale did not replace Consultative Selling, and instead added a tool to our box of possibilities, so too digital selling does not mean throwing away all we know. It does, however, mean we need to take a moment, step back, and reflect on how we do…everything. And a good place to start reflecting is the yawning gap in trust between buyers (our clients) and ourselves (the sellers).

[4] 2024 B2B Sales Benchmarks | Ebsta & Pavilion (joinpavilion.com)

Side note: Clients
So far, we've been referencing "buyers". Many of the studies we reference use the term "Buyer. "

We prefer to use the word "client.". We could use "customer." Why?

Well, as Sigmund Freud, the famous Austrian neurologist, put it:

"Words have a magical power. They can either bring the greatest happiness or the deepest despair."

Relationships with customers tend to be transactional and can lead to despair (often referred to as "buyer's remorse").

By contrast, the word "client" derives from the Latin word "cliens", and reflects the protective relationship between a patrician and plebeian in ancient Rome. The patrician relationship involved a degree of protection and care extended by the Roman patrician towards the plebeian who provided services. To this day, the use of the term implies a duty of care that does not apply to the word "customer."

Mind the [trust] gap!

Asked by HubSpot to name occupations that were trustworthy, a mere 3% of 928 respondents mentioned salespeople, only a little higher than the 1% who mentioned politicians, car-salesmen and political lobbyists. By contrast, doctors (49%) and firefighters (48%) were deemed most trustworthy.[5]

Similarly, a 2019 study of 250+ B2B Buyers across multiple industries revealed a depressing judgement on the quality of salespeople.

A mere 12% were deemed excellent; 23% good; 38% average; and 27% poor.[6]

Words matter

Underpinning poor levels of trust and corresponding under-performance is a continued reliance on sales language and sales approaches pioneered in the days of horse-drawn carriages.

As Zig Ziglar put it: *"There is power in words. What you say is what you get."*

Well, almost a hundred years ago, EK Strong set out the words we still use today, in his seminal book, *The Psychology of Selling Life Insurance* published in 1922.[7]

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[5] https://blog.hubspot.com/sales/salespeople-perception-problem
[6] infotanksmedia.com
[7] archive.org/details/psychologyofsell00strouoft/page/n9/mode/2up

Working in an office, sales teams often learnt from each other, almost through osmosis. This doesn't happen online.Virtual sales teams need new tools and a structured process for learning and sharing.

Steve Hallowell
VP Strategy, Highspot.

Chapter titles include:

- *Lesson XXVI: Diverting Prospect's Interest to My Proposition*
- *Lesson XXIX: Handling Objections*
- *Lesson XXXI: Closing the Sale*

Fast forward to today and not enough has changed: we still see the same push-oriented tools being forwarded under new packaging.

Time for a reset.
Time to stop viewing our clients as targets to be influenced, cajoled and coerced. We should not aim to divert the prospect to our proposition; we should co-create their approach with them. We should not handle objections; we should answer questions. Sales should not be closed; they should be open. And we should not team-sell with our "battle-buddies" (a phrase used memorably by one sales team we worked with).

If there was ever a time for us to evolve as sellers, and to stop battling with our clients, it is now.

> *Being on a video call requires more focus than a face-to-face chat. Our minds are together when our bodies feel we're not. That dissonance, which causes people to have conflicting feelings, is exhausting.*
>
> *— Gianpiero Petriglier*

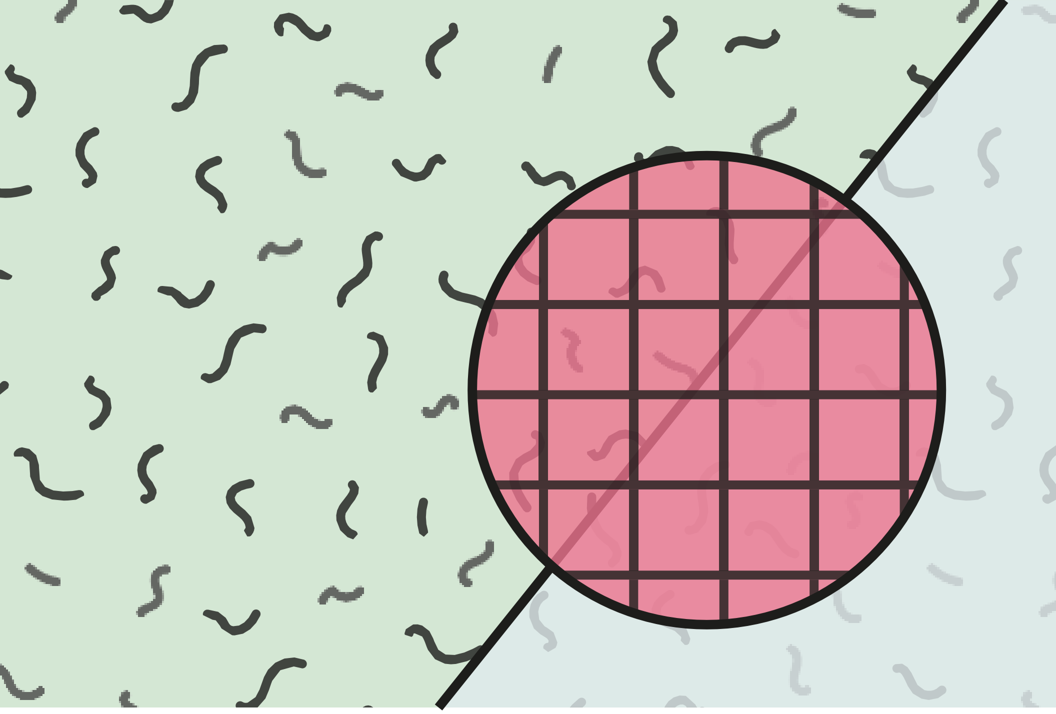
TL;DR

"Upgrading one's imagination about what is possible is always a leap of faith." — Clay Shirky[8]

1. We are living through a period of rapid change, and everyone is affected
2. Advisors and salespeople have an opportunity, among all the turbulent change, to re-position themselves as trusted advisors
3. Currently, however, there exists a large trust deficit between clients and sellers
4. Becoming a trusted advisor involves shedding behaviors from a century ago, and adopting new behaviors and approaches that build trust

Let's help you get there.

[8] Goodreads.com/quotes/3235986-upgrading-one-s-imagination-about-what-is-possible-is-always-a



2. Buying doesn't get easier

In 2015, Nick Toman, Managing Director of the Corporate Executive Board said:

On average, 5.4 critical stakeholders are involved in today's B2B purchase decisions. That's 5.4 different perspectives, often representing different functions, each with their own biases, beliefs, and goals. Couple that with overwhelming amounts of information, often contradictory in nature. Ironically, the very information that enabled the sophisticated customer is now overwhelming customers.[9]

[9] https://www.gartner.com/en/about/acquisitions/history/ceb-acquisition

By 2017, the Harvard Business Review reported, *"The number of people involved in B2B solutions purchases has climbed from an average of 5.4 two years ago to 6.8 today."*[10]

More recently, in 2024, HubSpot reported that there's an average of five decision-makers involved in every sales process today.

Interestingly though, in the same 2019 study of 250+ B2B buyers quoted earlier, more than 90% of respondents agreed that there is usually, or always, one member of the buying committee who tries to influence the decision their way. More significantly, 89% of respondents said that this person is successful most of the time.

This is backed-up by the Pavilion/Ebsta B2B Sales Benchmark Report 2024 which found that top sale performers are 519% more likely to have the required high-quality relationships. They are also 241% more likely to have the 'economic buyer' engaged before they present their offering.

OK, let's pause here. Experts have been telling us for years that we need to focus on multiple buyers, understanding the wants and needs of an ever-expanding number of people, but the unchanging reality is that almost all the time, a single, motivated person pushes their view hard enough to force their preferred outcome. The implications of a single person's choice, especially if they are the economic buyer, is huge for both you, and the buying company.

If we believe this, what should we do?

Well, one way would be to focus almost all of our attention on identifying the key buyer; analyzing their situation, and their various buying influences. Then examine factors that either strengthen or weaken our sales proposition.

[10] hbr.org/2017/03/the-new-sales-imperative

Everything focused towards persuading that single, powerful buyer.

We see a few risks here.

First, we focus our effort, instead of spreading it, and we make the wrong choice. We've all been there. We think we know the key stakeholder, but didn't account for the person pulling strings in the background. Or we win the key person's vote, but they then move to another position before the sale is executed and we're left high and dry.

Second, the sale goes through, but the implementation is dogged by problems (perhaps because the actual users of the product or service felt excluded from the original buying decision) and the prospect of future orders is compromised.

Third, in focusing too much on one individual and not attempting to facilitate a consensus-based decision, we risk exposing our key supporter and any future sales opportunities if, for any of a whole number of reasons, the purchase does not deliver the anticipated value.

Alternatively, we could help our client towards a consensus decision that will deliver results and not be regretted. Helping to build a consensus decision will also help us differentiate from our competitors who, if they are thinking narrowly, will be focused on making the single sale that is in front of them, as opposed to building a sustainable, trusted relationship that delivers multiple sales.

Sales is not about selling anymore, but about building trust and educating. — Siva Devaki

Buying is difficult

While we might think that it isn't easy being a salesperson, we need to realize that it isn't easy being a buyer.

Consider this, a massive 77% (so nearly 4 out of every 5) of the 750 respondents to a 2019 Gartner B2B buyer survey described their purchase as complex and/or difficult.[11]

Buyer indecision is every sales professional's worst nightmare and daily challenge.

In 2019, Aberdeen's B2B Buyers Survey that 53% of respondents halt or postpone decisions on at least half of the purchase processes that they themselves initiate. As you might expect, when decisions were made to halt or postpone respondents tended to assign the reason to vendors. 66% said the reason was that they could see no differentiation between solutions while 57% decided that no vendor met their needs.[12]

The numbers have not changed much. Wind forward to that 2024 Pavilion/Ebsta B2B Sales Benchmark Report[13] and 61% of deals were reported by sellers as lost due to buyer indecision. The common reasons given being lack of budget (**22%**), not a priority (**20%**), or a competitor (**14%**).

[11] gartner.com/en/sales/insights/buyer-enablement
[12] aberdeen.com/old-resources/b2b-buyers-survey
[13] 2024 B2B Sales Benchmarks | Ebsta x Pavilion (joinpavilion.com)

Meanwhile DemandGen's 2023 B2B Buyer' Survey highlighted newly added processes that buyers follow when making a decision:

- Conducting a more detailed ROI analysis (38%)
- Spending more time researching purchase decisions (31%)
- Altering decision timelines based on changing business needs/priorities (24%)
- Spending more time using social media to research vendors and solutions (24%)
- Relying more on peer recommendations/review sites (23%)

Also, it does not necessarily get any easier once they've made a purchase. Sana Commerce's 2019 B2B Buying Process Report of 560 buyers found that 44% of buyers experience online order errors with their top 10 suppliers at least every two weeks.[14] Such experiences can lead to buyer remorse which further adds to buyers' caution around future purchasing decisions.

While buyers can experience remorse and blame salespeople when decisions are postponed, when it comes to bad decisions, it seems they are more likely to blame themselves. Asked to consider the causes of buyer remorse from the last time they made a poor B2B purchase, in over 70% of the examples given in a 2019 survey, buyers blamed their own actions; not the product or salesperson.[15]

In an environment characterized by volatility, uncertainty, complexity and ambiguity (or VUCA - another of those acronyms loved by consultants), our clients need us to be trusted advisors.

The concept of a trusted advisor is not new. The book of the same name was first published 20 years ago.[16]

Smarter Selling, first published in 2007, advocated the salesperson as a trusted advisor and outlined the mindset, approaches and tools that would help salespeople achieve this status. Since then, *The Challenger Sale* (2012) and *To Sell is Human* (2012) have reinforced the need for broader, more business-oriented sales professionals focused on helping clients envision their future and the steps involved in getting there.

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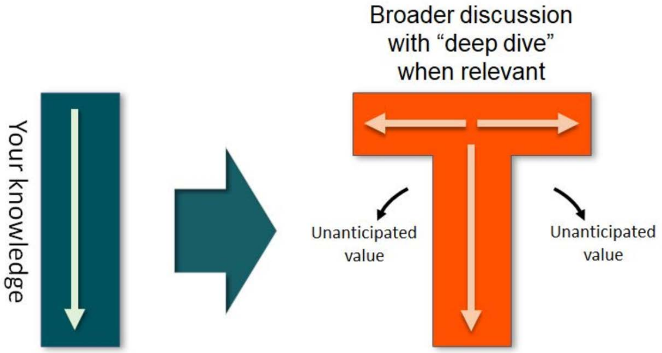
14 https://info.sana-commerce.com/rs/908-SKZ-106/images/sana-commerce-b2b-buyer-report-eng.pdf

15 https://www.gartner.com/smarterwithgartner/what-sales-should-know-about-b2b-buyers-in-2019

16 Trustedadvisor.com/books/the-trusted-advisor

I or T?

We like the idea of people being I-shaped versus T-shaped. An I-shaped person has deep knowledge, but in a narrow range.



A T-shaped person has deep knowledge in a particular area, but crucially also brings curiosity and wider business knowledge, experience and contacts to the conversation[17]. This leads to broader conversations that cover a wider range of topics and generate new insights and undiscovered additional value for clients (that in turn deepens trust and loyalty).

Historically, one challenge has been that new insights for clients often cut across traditional boundaries for sales organizations with the result that sales requiring cross-team collaboration fail to materialize.

That may now be changing as increased hybrid selling drives the need for proper sales enablement.

In the current environment, clients do not want to talk to self-interested salespeople and consultants, whose primary concern is making their numbers.

[17] Corporatefinanceinstitute.com/resources/careers/soft-skills/t-shaped-skills/

The person they are prepared to talk to, is the person who can empathize with their current situation, and help them figure out what to do next - a T-shaped person.

In the next section, Joshua will outline a map for just such a conversation.

TL;DR

"Contrary to what most people believe, trust is not some soft, illusive quality that you either have or you don't; rather trust is a pragmatic, tangible, actionable asset that you can create - much faster than you probably think possible."

— Stephen Covey

1. The number of people involved in buying decisions continues to increase though the ultimate decision may still be driven by one motivated individual and they tend to get their way

2. Building consensus among the decision-making and influencing group remains the smart goal

3. Clients see their role as complex and difficult with the consequence that decisions are often postponed or cancelled. Where decisions are made, buyer remorse is not uncommon

4. Against this background of complexity, indecision and remorse, there is the opportunity for sellers to step-up and become trusted advisors

5. Becoming T-shaped is the key to being a trusted advisor, where we assign a duty of care to our client relationships

6. Improved access to virtual resources enables salespeople to deliver better care to clients

3. From stability to possibility

Beyond simply being virtual (though we've already shown there is little simple about it), what else is different in our conversations right now?

Many people, including many of our clients, are under immense stress.

Welcome to scenario 3.

Michael Stanier writes in *The Coaching Habit*,

> *Five times a second, at an unconscious level, your brain is scanning the environment around you and asking itself: Is it safe here? Or is it dangerous?...When your brain feels safe, it can operate at its most sophisticated level.*[18]

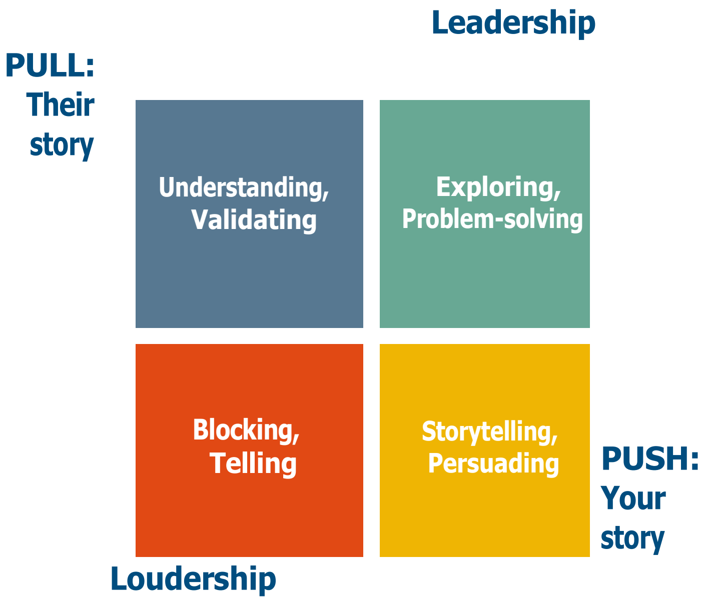
So how does this change our conversations in the here and now?

To understand what is different, it helps to map the kinds of conversations we had before, the gap our clients see, and the conversations we should be having to step into that gap. Whether delivering old school product pushing, consultative conversations, insight based selling, or co- creation sessions, roughly speaking, the majority of sales conversations can be mapped into the four zones on page 28.

One cardinal rule applies—you're in whatever zone the client is in. What do we mean by that—even if a salesperson tries to take the conversation into pitching or the green zone, if the client is somewhere else (the red zone or otherwise), then that is where we truly are. You can never go it alone. Unfortunately, a lot of salespeople go it alone, resulting in parallel monologues that never become a living dialogue of possibility.

A conversation often lives in multiple quadrants—let's explore how a few different sales conversations play out:

[18] goodreads.com/book/show/29342515-the-coaching-habit



Most people do not listen with the intent to understand; they listen with the intent to reply.[19]
— Stephen Covey

Product pushing (tell and sell): Firmly hanging out in the red zone with a salesperson often trying to nudge into pitching, but with a client declining or remaining uninterested. It's possible to move ahead this way if what is pitched just happens to be what is desired, but it's a scattershot approach. Listening in this mode is superficial at best: sales as a bingo board, where we only listen enough to hear what we need to align with, before pushing product again.

[19] Franklincovey.com/the-7-habits/habit-5/

Consultative sales (SPIN, Solution Selling, Customer Centric Selling, and similar): We head into pull by understanding client needs. If we're good, we'll resist our cognitive biases, which encourage us to take the easy and easily commodified answers that cause us to rush prematurely into pitching. Instead, we will take time to fully explore deeper needs—the question behind the question.
Only then do we pitch our solution, neatly matched with the needs identified. Depending on the complexity of what we uncover we may also employ mutual co-creation (into the green zone).

Insight-based selling (Challenger Sale model): Insight selling begins with a pitch in the bottom right quadrant, not of a product, but of an unanticipated challenge to our clients' current thinking of their business model/situation. Assuming we have framed it right we then shift back into pull, exploring the implications of this new narrative before pitching or co-creating a path ahead.

What is missing (if anything) as we heard into new waters? In changing times, we often fail to truly connect, explore, guide, and inspire a path forward.

Accenture has labeled the conversations we need to start having as the Now, the Next and the Never Normal, outlining them as:

The Now includes an emphasis on supporting people, customers and suppliers. The Next will feature refocusing the business to withstand new threats and seize new opportunities. And the Never Normal will require navigating rapid shifts in cultural norms, values and behaviors.[20]

[20] https://www.acccenture.com

We map our three core conversations to our quadrants in a similar way: The Empathy, The Trusted Guide, and The Creative Future.

What makes up these three conversations and how do they differ from those we had before on the conversation map?

1. The Empathy Conversation

"Empathy starts with curiosity. So, I ask you, in this moment, can you stop everything for a beat, take a breath, and be curious?"
— Peter Bregman

What's the difference between in discovery conversation and an Empathy Conversation?

Hanging out in that upper left-hand quadrant, there's significant overlap in terms of a focus on client needs, but a few key frames of emphasis that you'll need to pay attention to. While both have conversational goals around discovering potential concerns, an Empathy Conversation wears a stronger listening lens of "how can I help you?" while discovery might still be having the "what solutions do I have that I can sell you?" still lingering just beneath the surface.

You could argue that good discovery conversations should also have that primary empathy focus. You're right, they should, and what experience has taught us is how to be better salespeople by placing that focus first. But for those who do not, the cost is magnified exponentially. Charisma, low level listening, and positive pitching can carry many through easier years, but they won't cut it now.

Superficial empathy is compounded by continued economic worries, along with our lack of ability and the constraints of the virtual medium, even one year into this new world. We're not great virtually, it is harder to read people, and it is a tough year ahead. One potentially filled with many opportunities, but also one in which there is a high degree of uncertainty.

So, what does real empathy look like? Within a business context, there are three levels of empathy that we are looking at: cognitive, emotional, and compassionate.[21]

[21] skillsyouneed.com/ips/empathy-types.html

What's the difference?

Cognitive empathy means simply understanding why someone might feel something...and indeed bad selling mostly only reaches the space of cognitive empathy (with the classic phrase repeated ad infinitum "*I understand*"... before moving on to what we ourselves wish to say).

While useful for self-oriented information gathering purposes, cognitive empathy used without other modes rings completely hollow in terms of actually demonstrating our understanding in a way that helps clients.

At a minimum from a cognitive perspective, we need to remember that the client personas and journeys are constantly evolving. Historical customer insights are irrelevant and B2B client priorities are likely to have changed significantly. What matters is the now, but far too many organizations are still trying to copy and paste the way they used to do business in a virtual environment, and far too many sales training organizations are encouraging them to do just that with barely a token effort at differentiating the process.

Emotional empathy goes beyond mere understanding to actually feel what others can feel, stepping into their shoes, which is a crucial starting point for rapport in difficult times.

Our ability to emotionally connect with others allows us to see from their perspective and begin to consider how they feel in this new environment, and how they worry about their own business or are excited about what is possible.

> *The only true discovery, would not be to visit strange lands but to possess other eyes, to behold the universe through the eyes of another.*[22]
>
> — Marcel Proust

The third level of empathy is ***compassionate empathy,*** which goes beyond understanding and feeling to actually doing—being able to reach out and help our clients from a completely other-centered view.

This is not just a good idea from an ethical human sense, but also from the strategic view of how we can best adapt to a changing world. The potential for innovative solutions during these times stems not just from cognitive and emotional empathy, but from the problem-solving elements of compassionate empathy which allow us to grow new ways forward.

Let's be clear: What differentiates the Empathy Conversation from our regular discovery conversations focused on root-seeking and understanding? In a word— *focus*.

[22] goodreads.com/quotes/943993-the-only-true-voyage-of-discovery-would

While both conversations are client oriented, the Empathy Conversation reduces the emphasis on profit and refocuses on compassion.

Don't be mistaken: a great sales conversation in more normal times should also be highly empathic, and an Empathy Conversation is also, well, still a sales conversation, but the weighting we put between inquiry and advocacy is shifted, and the inquiry itself is less viewed through a sales lens, and more starting with the simple phrase:

How can I help?

How well do you and your organization do this? A few key questions to ask and a few key steps to consider:

1. **Human to human.** How can we demonstrate empathy/ humanity in our interactions? What questions should we ask? Recognize that virtual business meetings can be stressful for your customer...and to you.

2. **Lead with support, not force.** What can we give? Who can we connect clients to? How can we remove friction? How has this affected their clients?

> *The quality of your attention can determine the quality of another person's thought.*[23]
> — Nancy Kline

[23] goodreads.com/book/show/1020273.Time_to_Think

Your prospect's customer now holds the key to your success. Step into their shoes—to what degree can you accurately describe their perspectives of their challenge in their words? If you don't know, ask "Given the new environment, has anything changed with your process?"

And if they don't know, help them identify their evolving needs in this ever-changing market.

Look around: Who can we benchmark? There is a tendency to only look towards what we ourselves have done or potentially our close competitors have done, but in times of crisis, it's helpful to be more T-shaped and cast a much wider net to gather best practices for better engagement and customer focus.

Think about organizations and individuals in a business capacity who you feel really demonstrate empathy and proactive outreach.

3. **Empathy begins at the beginning with an agenda and an invitation:** a frame that allows us to set up the conversation and ensures that we also invite their perspectives in. Asking questions enables a jointly developed environment. A good opening allows us to approach the conversation from a different place, a place of deeper empathy.

Fundamentally, people are not interested in being sold to while they do not feel psychologically safe. While our next conversation, *The Trusted Guide*, focuses on painting that path to safety, our Empathy Conversation creates the base on which all of this is built. People won't let you help them if they do not feel listened to and understood.

There is good news in this space thankfully: the effort to do so, to shift your mindset to greater empathy, has actual results:

> *Across all studies, we found a modest, yet significant positive relationship: people who believe that they take the other's perspective also perform better in tests of emotion recognition. Beliefs about taking others' perspective thus reflect interpersonal reality.*[24]

For more on empathy see: http://cultureofempathy.com/References/Test.htm.

[24] frontiersin.org/articles/10.3389/fpsyg.2019.02475/full

2. The Trusted Guide Conversation

Normally in the bottom right-hand corner, we'd have elements such as pitching and persuasion. Of course we'd be structuring these well, focusing on client challenges/ opportunities first, before pivoting to how we can help them become the hero of a narrative where they overcome these challenges. To some extent that is still the case: what is different here is our initial area of focus and the types of narratives we choose to illuminate them.

Side note: Check out the section on Framing Conversations in Part 2 of this ebook for practical help on how to set up a safe and trusting conversation environment.

This chapter has been labeled from stability to possibility for a good reason: these are the exact type of narratives we are trying to bring to the surface. With clients so concerned about the present and near future, there is often decision paralysis and it's a dangerous holding pattern which begins to take over all conversations. We put off, well, everything, until tomorrow with the hope that tomorrow will look like yesterday.

It won't.

That doesn't necessarily need to be a cause for panic and inaction, and it's our job as trusted advisors to help our own clients see that. To do so we first need to give them some measure of stability, a sense of safety in the here and now, before opening them to what might come next.

Stability narratives are one of the rare cases where we might want to share a bit more about what we, as an organization, are doing. Yes, it's critical always to be client- focused and customer-centric, but in times of challenge, we also need to step back and clearly share how we are managing the situation, not panicking, and remaining there for our clients.

This needs to be done by showing and engaging, rather than simply telling. It's one thing to tell someone that we've got their back and entirely a different thing to demonstrate exactly how we can help in these dynamic times.

A quick example from Joshua:
I'm from Hawaii, so I could tell you that Lanai beach is the best beach in Hawaii. I could even give you a statistic such as "73% of all people living in Hawaii feel that it is the best beach."

I've given you my data and my "expert" opinion. Maybe you believe me. Regardless of whether you believe or doubt, the way you will decide is by taking my data and opinion and combining it with your own evidence sources to build a mental model.

How do you do that? Well, the human brain is both beautifully lazy and curious - and it will use its existing experiences and wrap them around my statements to build that model. What's the problem with this? Oftentimes, your easily and readily available experiences will not align with the model I want you to take with the decisions I want you to make.

We get around this by showing instead of telling. By sharing an actual mental model rather than just a few data points and ideas around which we invite our client to build their own model.

I will share with you how Lanai beach is 5km long with beautiful volcanic sand, perfectly clean water, and not too many people. I will share how I used to play on the beach as a child with my brother and build sandcastles for hours. In doing so I'm not simply giving you facts and expert opinions, I'm handing you my own mental model and giving you the opportunity to try it on. As Seth Godin noted, “persuasion is the transfer of emotion,” and in sharing with you my mental model, I'm sharing with you how I feel about a particular situation.

The funny thing is, because the brain is both curious and lazy, rather than initially trying to build its own mental model, it will try on the one I hand to it, especially if I've painted an enticing picture. This doesn't mean that you will automatically agree with me, but it does increase the likelihood that you will listen rather than simply push back.
If I then want to take it to the next level, I'll ask you what you would do on the beach? In doing so, take what was my story and begin to make it your own.

This, exactly this, is our path from stability to possibility.

We need to share case studies and examples of how we, as individuals and as an organization, are supporting our partners to be safe in these difficult times, and then to pivot to where that stability can go next—bright spots and positive examples of how our how clients are changing what they do to realign and achieve positive results for today and tomorrow.

As with the beach, what is most critical here is your ability to pivot the narrative back to the client; to ask them what stability will look like for them, and to move them to consider what is possible going forward.

3. The Creative Future Conversation

Let's be clear: you're probably not looking under enough rocks.

What do we mean by this? Linus Pauling famously said,

"...the best way to have a good idea is to have a lot of ideas."[25]

Recently, when Joshua was facilitating, we asked senior sales leaders how many of them had read their own company's briefings on an important situation impacting their customers. Less than 15% raised their hands.

Next, we asked whether they had read the briefings on the same occurrence by BCG, McKinsey and many others as to how this was impacting sales and their own industries: again, less than 15%.

Too often, when we look to the future we tend to look to the past: to lean on what we already know and rely on and to seek answers under the same rocks we have looked under for the last many years. While this is not an ideal practice during more normal business times, it is positively dangerous when so many changes are occurring around us.

[25] goodreads.com/author/quotes/52938.Linus_Pauling

We need to be explorers, not builders of bomb shelters.

Challenging environments speed up the potential for innovation in many fields, and how we respond and capitalize on that is up to us.

So, what can we do?

- **Change the frame:** What conversations might your clients be more open to?
- **Find better rocks:** Where can you look for future insights? What new markets can you consider?
- **Future proofing:** What trends do you see impacting the market going forward? What small experiments can you pilot to test the waters?

Creative Future Conversations are research-based, applied improvisations: we don't know exactly what the future holds. Improv has as one of its core beliefs the idea that we are always adding to what is before us, that we say "yes and" rather than "yes but" to what is presented. We build on whatever is said and continue.

Fun mental gymnastics, but also the secret to resilience in the face of great challenge: to be able to quickly, on the spot, connect ideas together in new and novel ways, to build associations and seek new possibilities. It's no wonder that the MIT and Harvard study "the innovator's DNA[26]" found associative thinking as the most powerful of creative forces.

We have the ability to not only survive in this new environment but to thrive. To do so though, we need to look under different rocks.

[26] https://hbr.org/2009/12/the-innovators-dna

What differentiates the Creative Future Conversation from the general green zone?

In some ways they are similar as they both focus on problem-solving and generating new ideas that work for both parties. Where they differ is in terms of urgency and need. While it's true that we always need to future proof our organizations, never is that truer than in times of crisis. How well we manage to create future conversations now, will in many ways determine not only whether we get through this, but how our clients get through this as well, or even whether it is with us that our clients get through it.

Organizations able to create a Creative Future Conversation will find themselves trusted advisors to their client base, and those that remain planted in the past will find market share slipping away.

TL;DR

1. Our brains seek security, and right now they're not finding it

2. Common approaches to sales conversations are falling short: product-push, consultative, and insight-driven

3. Clients benefit from three conversations:

   - the Empathy Conversation;

   - the Trusted Guide Conversation;

   - the Creative Future Conversation

4. Aim for compassionate empathy which goes beyond understanding and feeling to actually doing

5. Build trust and engagement through curiosity, backed by showing, not telling

6. Look under more rocks!

We’ve found that trust is harder to establish when you do not meet face-to-face.

Steven Roelendts
General Manager
Unitechnology

Part 2:
Tools for the new world

If you get up in the morning and think the future is going to be better, it is a bright day. Otherwise, it's not.
— Elon Musk

David here. When my sons use my DIY tools, they do not always return them in a condition that I find satisfactory. When I complain, they retort:

"Tools, not jewels."

This applies to the rest of our ebook. Take the tools and approaches we describe, then apply them, flex them, and adapt them. There is great value in these pages, but only if you move to action.

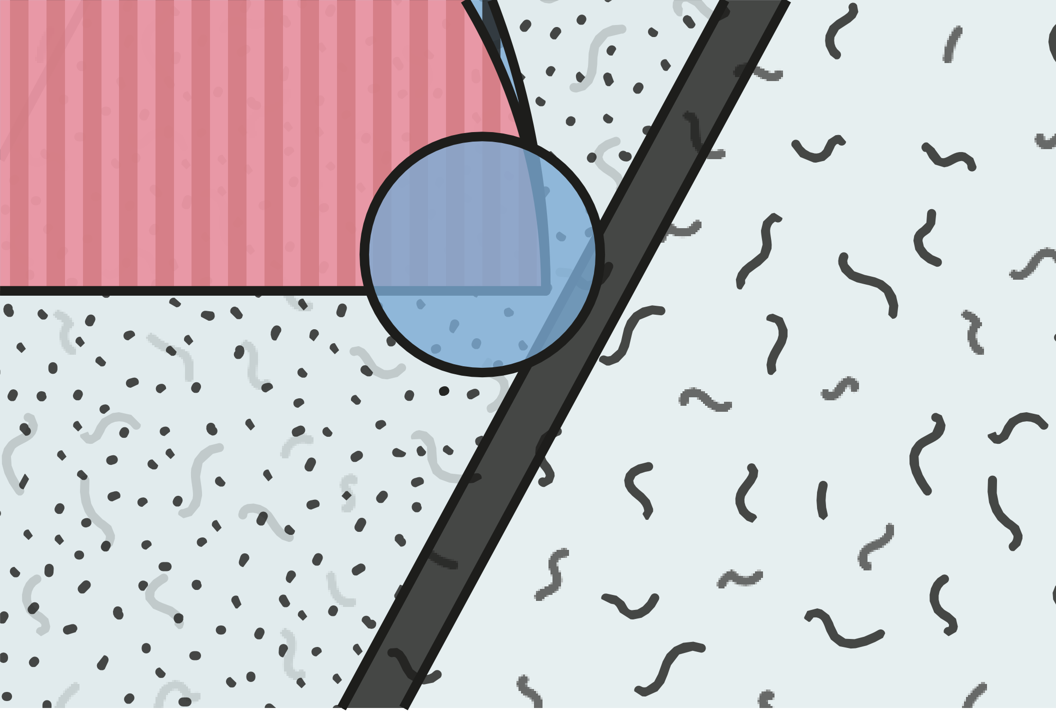
We've all read books, taken training, bought gadgets, and then failed to take action.

Don't let that happen here.

It takes extra effort to try something different, but the rewards are worth it: easier conversations, greater loyalty, referrals, testimonials, and yes, greater revenue and better profitability.

Plus, at a time when people feel the need to do the right thing; you'll be doing the right thing. Moving from self- focused approaches that seek to answer the question "Why me?" to instead seek the answer to an altogether more interesting and important question: "Why change?"

Become the trusted advisor who helps clients change.



4. Prepare to succeed

Salespeople need to prepare fully and differently for online sales meetings.
— Bob Frisch

The need to prepare - not the most exciting aspect of virtual meetings, but consistently mentioned by our interviewees as one of the biggest differentiators.

Of course, we should always prepare for meetings and conversations because it is respectful to do so and enables more productive discussions.

We know that, but we don't always do that. We've done this enough times to know that we can't "wing it." Not in virtual conversations.

The scope for winging it has narrowed massively and the scope for making a bad impression through lack of preparation has similarly increased massively. More people, more senior people, possibly a recording of the conversation … you get the picture.

We're going to take a critical look at the multiple elements that contribute to good preparation in the virtual space, and of course, we're going to give you some tools to help you be your best. Here's what we'll cover:

- **Prepare the space**
    - Workspace
    - Headspace

- **Prepare the technology**
    - Audio
    - Video
    - Visual

- **Prepare to engage**
    - Welcoming
    - Framing

Prepare the space

Workspace. Our physical workspace impacts how we feel about work. If you need proof, look at the rise of designer workspaces in cities across the globe and the rise of companies like WeWork. Similarly, our work-at-home environments affect our mood and our performance in virtual calls and meetings.

Working long hours on consecutive video calls, sometimes in spare rooms or basements with no natural light, overhearing the sounds of life outside our work-cell, not surprisingly can lead to dark moods. And while our loved ones may have how to deal with the frayed edges generated by our new work regime, we can't expect the same of our clients.

The elements of a more comfortable space for virtual calls are fairly obvious:

- **Natural light.** Preferable to any artificial light and more soothing to our psyche, natural light (unless direct, bright sunlight) is also better for video calls. Please, no harsh overhead fluorescent lighting!

- **Quiet**. Quiet spaces are better for concentration and obviously preferable for virtual calls. Noise can also scramble our senses and our brains, so before important calls, consider leaving aside 10 minutes or more to experience quiet and calm your mind.

- **Seating**. If you're sitting, be sure your seat is comfortable - you do not want to "fidget" on a call and have it be misinterpreted with discomfort with what is being said, when it is only that your chair is uncomfortable! You might think about standing for video calls as this allows a greater range of movement and projects more energy than sitting. Standing when speaking takes on greater significance in virtual environments where energy is important for maintaining engagement and demonstrating enthusiasm. Joshua has a custom shelf for this purpose that he attaches to a window (to get that natural light), while David has an adjustable sitting/ standing table.

- **Plants**. If you have a window, hopefully you also have a view that includes greenery. If not, consider some houseplants for your workspace. Green is a naturally calming color and plants filter carbon dioxide that can build up in poorly ventilated environments and can cause lethargy, impaired mental function, and headaches.

For more guidance on preparing to succeed with your virtual conversations visit the Tech check yourself application canvas at relcap.academy.

Headspace. We might like to think that we enter conversations with an open mind, ready to listen, willing to learn, and eager to help where we can. While this may indeed be our intention, it is, unfortunately, surprisingly difficult to achieve, primarily because whenever we enter a new conversation, our biases, preconceptions and prejudices enter with us.

People's mood is really determined primarily by their genetic make-up and personality, and in the second place by their immediate context, and only in the third and fourth place by worries and concerns and other things like that.[27]

— Daniel Kahneman, Nobel Laureate

When we enter a conversation we should try, as best we can, to acknowledge our biases and preferences since, as Dan Ariely, author of *Predictably Irrational* puts it:

"Even the most analytical thinkers are predictably irrational; the really smart ones acknowledge and address their irrationalities."[28]

The problem with biases and preconceptions is that they lead us to be confident in the wrong places: over-confident in our judgement, skills, and decision-making.

We think we know the facts, when really we don't. We think we have the necessary skills and experience (perhaps because we've seen something similar before), but we don't. We make a decision when we haven't fully understood the situation.

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27 goodreads.com/book/show/11468377-thinking-fast-and-slow

28 https://danariely.com/buffett-and-his-attempts-for-self-contro/

Sound familiar? Of course it does. We all do it, all the time, because we're human. Biases and preferences are notoriously hard to counteract since they are part of our make-up. Researchers and psychologists are pretty much in agreement that the only way to mitigate the impact of our biases is to be aware of them and constantly monitor them.

Our advice? Read-up on the most common biases that affect business conversations and decisions, then before you enter a conversation, remind yourself that you need to be alert to signs of bias in your conversations - particularly those that you may be more prone to.

Five common biases to be aware of:

- *Confirmation bias*: where we place extra weight on evidence and opinions consistent with our own experience and beliefs.
- *Liking bias* (sometimes called the Halo effect): where we add weight to the views of a person because we find them physically attractive or likeable in some other way.
- *Availability bias*: where we reach for the easiest available answer. Or the convenient lie: when we should look harder to find the inconvenient truth.
- *Self-serving bias*: where we attribute positive outcomes and events to our own character, efforts and behavior, while attributing negative outcomes to external factors.
- *The Curse of Knowledge*: the tendency to assume knowledge in others (think technical knowledge) and explain ideas in a way that we think simple to follow but which for others is difficult.

For a longer list, check out ***Psychology Today***: psychologytoday.com/intl/basics/bias

Access the [Avoiding bias – limiting the impact of damaging instincts] application canvas at [relcap.academy] which covers cognitive biases in more detail.

A second element of our mental preparation should be understanding our preferred behaviors. While the most common criticism of the virtual environment is that it limits the ability to read facial and other non-verbal signals; virtual conversations still leave enormous scope for us to match the behaviors of others which typically increases levels of rapport and liking; or to mismatch, which can lead to the opposite - a feeling of not connecting.

Many organizations now place great emphasis on understanding the behaviors that drive team cohesion, collaboration, and performance using assessment tools to measure personality traits and personal styles. Surprisingly though, despite widespread recognition that buying decisions remain largely emotional decisions, backed by selected supporting evidence, few salespeople and consultants pause to actively consider the personality and preferred behaviors of the individuals that are about to meet.

As another Nobel Laureate Richard Thaler puts it:

> *The lesson for businesses is you are dealing with real people. Those are your customers, those are your employees, those are your bosses, and the better you understand how real people tick, the more successfully you will be able to accomplish your goals.*[29]

[29] knowledge.wharton.upenn.edu/article/misbehaving-psychology-meets-economics/

One tool we recommend, **Prefrr©**, for understanding your own behaviors and then using that knowledge to think about the preferences of others, can be found at here. The behavioral preference categories you can choose from are:

- Big picture / Detail
- Opportunity / Fear (Caution)
- Leading / Following
- Feelings / Facts
- Free-flowing / Organized
- Listen / Ignore
- My best / Better than you
- Trust / Control
- Your needs / My needs
- Optimist / Pessimist

Prepare the technology

Joshua here. We've all been using video calls since the pandemic, and yet just last week I was evaluating a client in a sale's simulation and there he was, with a shoddy web camera pointed awkwardly up his nostrils, poorly lit, using the built in microphone of his laptop so that every word echoed…echoed…echoed. I asked: is this the same setup he has for daily client calls, expecting it was not.

Alas. It was.

How are we still here? No wonder clients are less than impressed with the virtual buying experience:

Good ingredients lead to good sales calls—our tech is just tech, but if our tech is terrible, we're toast. Good tech doesn't save bad sales calls, but bad tech can make good sales calls next to impossible.

You don't need to spend thousands upgrading, but it helps to get the basics right. Authenticity, presence, and connection can be challenging face-to-face and are even harder remotely.

So, what is the bare minimum?

We need to take into account four key touchpoints: audio, video, visual, and engagement logistics.

Your goal? Become so practiced with your tools that the tech disappears and the conversation human to human is what remains so that your interaction makes the screen fatigue vanish as it does when we connect with old friends.

Audio: Get a good mic. Your built in one on your computer? Don't even think about it—it's omnidirectional and picks up every echo and noise in the room as well as creating feedback loops. Get a headset.

Zoom audio runs at 96kbps, or the world's worst mp3, meaning your normally resonant voice loses much of its impact, and a sub-par mic exacerbates the issue. Switching to a better mic (Add in call out with suggested mics) and increasing your vocal variety will give that warm impression of really being there. Want cleaner audio cheaply? Install Krisp[30], which helps to clean up both the sound coming to you (so you can hear clients better) and your sound to them. It's free up to 120 minutes a week, and less than a cup of coffee a month for unlimited use beyond that.

Video/lighting: Turn that video on[31]. Your computer webcam is not enough and usually sets up a terrible angle as well. Get a proper webcam for clarity and better angles to at least somewhat recreate eye contact. Logitech cameras are our go-to option (as they have downloadable software that allows good framing adjustment), but almost anything is better than your built-in webcam. Light yourself well and keep backdrop distractions to a minimum if possible. Also, if you wear spectacles, consider removing them as the light they reflect can be quite distracting.

Being on a video call requires more focus than a face-to-face chat. Our minds are together when our bodies feel we're not. That dissonance, which causes people to have conflicting feelings, is exhausting.[32]

— Gianpiero Petriglieri

30 krisp.ai/

31 https://www.zoom.com/en/blog/turning-video-on-your-secret-weapon-for-higher-win-rates/

32 bbc.com/worklife/article/20200421-why-zoom-video-chats-are-so-exhausting

Sales just got harder, again. Virtual selling is exposing the cracks. You can't "cuddle" online. You can't connect if you just throw-up your brilliant solution. You need to engage fast and you can only do that with broad commercial acumen allied with genuine curiosity and desire to help.

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Keith Dugdale
Smarter Selling (Co-Author)

Visual: The worst thing we can do for visuals is to simply take our face-to-face decks, and screen share them, as is - size being reduced to a tiny postage stamp in the corner. Better options are abundant. Our personal favorites:

- **At a minimum, simplify your slides**. If you put thick text on a monitor and screen share it, and then try to speak to that text…you've already lost your audience who is naturally reading it.

- **Project it behind you**: whether using MS Teams, Zoom, or other platforms, it is possible to take your slides and project them behind you (like a weather reporter on the news), where they truly start to support you and your conversation, rather than dominate it. You can do this directly in Zoom, for example, by exporting your slides to images and turning them into your virtual background, or by using the advanced "slides as virtual background" option under the "share screen" tool. These are great options if your company won't allow any downloads of external programs. However currently the best choice is the Mmhmm App[33] (yes that is its real name), which allows you to seamlessly share images and slides behind you as well as a variety of other content like program windows and secondary camera views.

- **Draw it out**: get a tablet, connect to Zoom, and draw out the conversation. Capture client ideas, either freely or using our suggested templates. Nothing keeps focus better than a shared space being created live rather than a static info dump. Our favorite app for mapping conversations like this is Miro[34], but even something as simple as Epic Pen[35] will improve your sales capturing game.

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[33] mmhmm.app

[34] miro.com

[35] epic-pen.com

- **Co-create it**: platforms like Miro/Mural can also be used alongside the client to create a shared virtual space for sales conversations, where together you can map out on a larger scale the challenges and pathways ahead. As Shekhar Kapur notes, "We are the stories we tell ourselves"— it is one thing to have you capture a client's conversation, and a wholly other level to do so together. By collaborating on what is captured, ownership of the process becomes shares—more real consulting than "telling" sales.

- **One note on dual monitors**: optional but awesome. Having two screens allows you to have videos on one screen and whiteboards/slides, etc. on another, greatly easing client management in a call, especially if you're using more than just your main platform (Zoom, MS Teams, etc.). Don't have 2 monitors available? Turn a tablet into a 2nd screen with Mac's built in Sidecar or the app Duet)[36].

- **Don't neglect the follow up**: a positive and engaging sales conversation often finds its momentum stalled by sub-par follow up. While a timely meeting point summary is a must, adding a visual dimension through links to the capture conversation, or through using tools such as VideoAsk[37] to do a brief recap and survey question post call can make a memorable impact that goes beyond the expected.

[36] duetdisplay.com

[37] videoask.com

The secret to virtual selling is to bring a visual dimension into your conversations. That visual dimension enables you to engage the buyer in a visual conversation about their issues...and about what's driving change in the organization. Then drawing out the buyer's objectives and helping the buyer to create a vision for what a future state could look like.[38]

— Corporate Visions

Prepare to engage

Welcoming. Repeat after me—I will not copy and paste my face-to-face agenda in a virtual environment. Conversion of face-to-face engagement is not enough. We need to transform. How so?

Better, warmer, on-boarding: As Priya Parker wrote:

The way we gather matters.[39]

Like our clients, we're bouncing between a plethora of meetings, busy, potentially stressed, and in need of human connection. How can we welcome clients in a way that makes them feel ready to share, even prior to the call?

To set up a space that welcomes true sharing, we need to think of how to onboard in terms of tech, tone, and topic: making clients comfortable with the platform, setting the tone for the meeting.

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38 corporatevisions.com/virtual-selling

39 https://www.priyaparker.com/book-art-of-gathering

For a start, we should turn up early. A few minutes early if we're participating and at least 5 minutes early if we're leading. Checking technology is a must, preferably by testing with a colleague 10-15 minutes before the call is due to start.

When others start to join the conversation, we could do worse than asking them how they're feeling. This may not be appropriate in a group setting, but when one-on-one, asking someone how they are doing is much more effective than other standard openings such as "Is now a good time?" or "Is this a bad time?" In one dataset of 90,380 cold calls, one opening line stood above the rest: "How have you been?" Call success was 6.6 times higher than the baseline when this was asked.[40]

Enquiring how someone is feeling can be a good way to establish an emotional element into a business conversation. Of course, our interest must be genuine. Faked interest in another person's well-being is always apparent.

Of course, we can also ask other questions to help break the ice, but there are some topics to steer clear of, as we might accidentally step on a sensitive area - and why take that risk. Asking how many calls they're doing that day is safe enough, but asking about holidays (when they can't travel) or family (if we do not know them well) can cause discomfort. Even talking about the room where we're talking from might cause someone in a less comfortable environment to feel, well, less comfortable. Our advice: if in doubt, play it safe and stay away from personal topics.

As noted in the previous section, our mood state makes a difference, so if we're leading or initiating the meeting, we should start the meeting with some drive and energy to set the tone, since a positive opening typically sets the mood and increases engagement, creativity, and decision making.

[40] gong.io/blog/cold-calling-tips/

Do not fall into the trap of a positive monologue though! This is not theatre. We should welcome meeting attendees and, unless not appropriate, express appreciation and gratitude for attendees' time, seeking to include everyone in our positive opening.

If we're not leading, we can still be an active meeting facilitator, thanking people for their contributions and asking people for their thoughts and opinions - by name. This also alerts meeting participants to the potential that they may be called upon at any time and so helps with engagement.

With our colleagues, we should identify before the conversation who will cover which topics and plan time accordingly. Even more than in face-to-face meetings, in virtual meetings, less is more, so we should keep your responses short and leave space for our clients to ask questions.

Pre-planning an agenda with our colleagues and welcoming meeting participants (especially those from our client organization) are essential prerequisites for a smooth online meeting. Equally, or even more critical, is how we present our agenda.

Framing. Joshua wrote earlier that we can't cut and paste our face-to-face agendas to the virtual space. While he is right that we cannot cut and paste, it is also true that almost all the buyers and sellers that we interviewed told us that virtual calls tend to be more focused and productive than face-to-face meetings. Equally, while salespeople complained that they missed the "relationship building" aspect of meetings with clients, clients do not feel the same way.

When we dug a little deeper, we found that clients did still engage in "relationship building" conversations (that might more accurately be described as rapport-building), but they did this at their time of choosing, not the time chosen by the salesperson, and generally not at the start of the conversation.

This behavior puts a greater onus on us to craft a meeting environment focused on our client's interests and then move efficiently through the meeting agenda to leave space for rapport building.

So, how should we frame a client-focused conversation?

Virtual best-practice is actually very similar to real-world best practice. What clients look for early in a conversation is:

- the reason or purpose of the conversation;
- an outline the proposed broad flow and timings;
- some idea of what is required of them; and
- an idea of what they will gain from the discussion.

From your own experience, which of the four elements above do you think is most important to clients?

Being admitted into client’s homes, their lives, can foster a closeness that is more difficult to achieve in the sterile environment of a corporate boardroom.

Apolinario “Jun” Medalla,
Exec-Comm

Done that?
If not, you've got one more chance before you read on. Try, it's worth it. **Promise**.

When asked to choose which is the most important, people overwhelmingly choose the final element - having some idea of what they will take away. After all, by agreeing to a conversation, you commit your time, your attention, and possibly information about yourself. It is reasonable to expect some return for that investment.

Now ask yourself, which of the four elements do you typically address early in a client conversation?

Our finding is that people will typically deal with the purpose of a conversation and outline some form of agenda. The third point around participation may get picked up in the outline agenda, but the 4th point addressing what the client takes away from the conversation is almost never covered. Almost never.

Dov Seidman tells us:

There is one area where tremendous variety still exists, however, one place that we have not yet analyzed and commoditized, and which, in fact, cannot be commoditized: the realm of human behavior – How we do WHAT we do.

The tapestry of human behavior is so varied, so rich, and so global that it presents a rare opportunity, the opportunity to out-behave the competition.[41]

Explaining to your client, early in a conversation, what you intend them to gain from participation in the conversation, is a mostly missed opportunity to differentiate your behavior and start to out-behave your competition.

It also addresses a significant risk. If you do not make it clear to your client what it is that they might take away, you risk their mental attention being focused on answering that question, when you would prefer their attention to be focused elsewhere.

[41] https://www.amazon.com/How-Why-Anything-Means-Everything-ebook/dp/B005OKPDS0

A simple mnemonic (and mnemonics work) that we use to frame conversations and focus on the outcome for clients is **I We You.** Let's break it down.

I for intent.

Most people want to know the reason you're taking up their time. This answers that question as quickly and directly as possible.

Two examples:

"My reason for calling you today is…"

"I was thinking that today, it would be good if…"

We represents how we are jointly going to use the time on this call - a loose verbal agenda that aims to involve the other person. Traditional sales approaches suggest that the salesperson should always be in control. If this was ever right, it certainly is not today.

For additional focus, you might involve times and mention who will cover each topic.

Two examples:

"I thought we might start with a discussion of current market conditions and then move on to your plans for next year and the longer term. How does that sound?"

"One way we could use the time is to spend around 10 minutes discussing current regulations and restrictions, then another 10 minutes looking at how these might develop going forward. Or are there other things we could more usefully cover?"

In our interviews, one point frequently mentioned was that virtual meetings are more tightly managed - and time is monitored. Consequently, it makes sense to allocate time slots to each topic we plan to cover. This also makes it easier to bring calls back on track if they veer off on an unproductive tangent. We should also aim for short meetings. An hour is the maximum, 45 minutes better, and 30 minutes better still. One senior consultant we spoke to said that their firm aimed for 25-minute conversations to leave 5 minutes for “rest and refocus” before the next call.

After suggesting key topics for discussion, it is important to pause.

We should stop for a moment and leave space for our client to consider the suggested agenda. Then, after a pause, we can confirm the time available, if we haven’t done that yet, and ask if they have other topics they want to discuss:

“I think we set aside 45 minutes for this meeting, is that still OK? I was also wondering if there were other points you wanted to discuss?”

This pause and question shows respect for the other person and their time. It also signals, very clearly, that we want to involve them in setting the agenda. The majority of the time clients will not add to the agenda. That’s OK, we asked – and they will have noticed that.

You is by far the most important element of **I We You.**

Why so significant?
Because it demonstrates a strong focus on client value and differentiates us from most people who are nervous or unthinking about communicating the value they aim to deliver.

Reflect for a moment on how many times you've sat in a conversation asking yourself "Why am I here?"

You answers that question.

It briefly lays out what the other person will take away from the time they spend talking with us. Critically, it answers the "What's in it for me?" question that we all have in our minds when someone asks us to join a conversation.

More subtly, but also very helpful for our goal of building trust, if we state, early in a conversation, what we want our client to get from talking to us, we will be much more focused on delivering that value. Simply put, if we have a vague notion in our mind that we should deliver value in the meeting, we typically fail. If we state that we will deliver value, we work much harder to make it happen.

On virtual calls, where keeping attention and avoiding distractions are great challenges, **You** is critical to engaging clients' interest and attention.

When we make a **You** statement, our clients notice. It resonates. They nod. They lean forward. They're engaged.

Here are some examples:

"By the end of our conversation today, my goal is to have shared with you the current best practice across different industries so that you can decide how this could improve your business."

"…such that by the end of the conversation you are clear on the current state of the project and the different options for moving forward."

"My goal for today is to answer all the questions in your mind so that you have all the information you need to make a decision."

Top tip:

We have found that in almost every situation there are three tangible points of value that we can all aim for in any conversation. This sounds like a big claim, but we've tried this in countless situations, and it works!

Asked to name three sources of tangible value, some people say "honesty" or "friendliness." These traits might be valued, but they are not tangible.

These are:

- Insights (from knowledge)
- Experience (what you have seen others do)
- Contacts (people you know)

Interestingly, the "Contacts" category is usually the last to be identified, and many groups do not identify this at all. This is a bit surprising given how much value we all attach to the relationships that help us do our work better. Then again, it offers yet another opportunity for us to be different if we do make a point of expressing our desire to share and then following through.

And an example that puts a bit more pressure on you to deliver:

"I will feel that I've failed if, by the end of this call, I haven't been able to share some information that you find useful and can apply immediately."

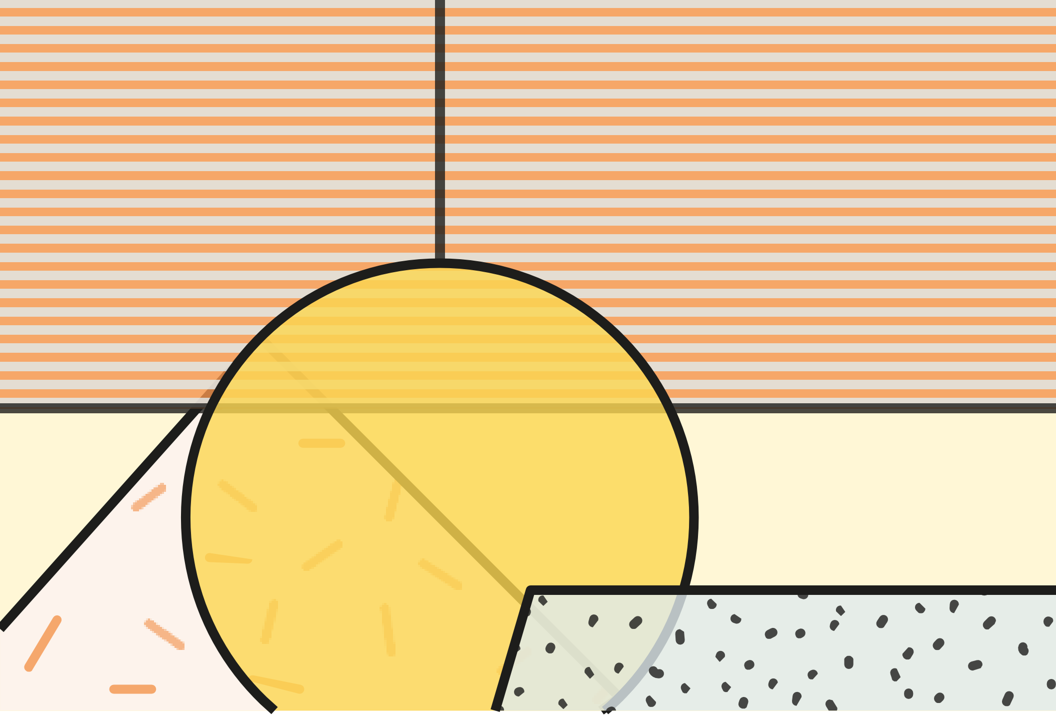
Note that our service, product or organization is not mentioned in any of the above examples. The focus is 100% on what the client takes away.

So, there it is, a simple mnemonic that can have a huge impact on setting the environment and launching conversations in the right direction. The **I We You** framework is also great for requesting meetings. Try it in an email; we think you'll be pleased by the response you get!

Access the Getting meetings with busy people and the Setting the conversation environment canvases at relcap.academy which cover **I We You** in more detail.

TL;DR

- I bet you're expecting a summary here. Let's change things up: how would ***you*** summarize the last chapter?



5. Discover & Envision

Joshua wrote earlier about the conversation map: understanding where you are in a conversation and moving from stability to possibility. In this section of the ebook, we'll take a look at tools that help us as we navigate through Empathy and Trusted Guide Conversations and on to Creative Future Conversations. Allied with genuine curiosity about our client's world and an enthusiasm to discover and envision opportunities, these tools can help us be the trusted advisor our clients tell us they want and need.

Tools for better virtual conversations:

- Empathy Maps
- Appreciative Inquiry - improv "yes, and"
- Questions - SHAPE, Focus-5, and Spicy!
- Value Sheets

We’ve just learned how I We You can set us off in the right direction, focusing on what is valuable to customers and clients in our sales calls.

Empathy Mapping in curious times

Automobile innovator Henry Ford is often quoted (true or not as saying, *“If I had asked people what they wanted, they would have said faster horses,”* with this being used to justify that to be true innovators, especially in rapidly changing times, to listen to customers would be foolhardy. But is it really so?

Carol Roth disagrees with the assumption, pointing out:

> *Customers would probably have told Ford exactly what they wanted—specifically, a faster mode of transportation. They might not have mentioned the need for a combustion engine, but that's part of the art and science of understanding customer feedback.*[42]

Excuse the horrible pun ahead: we often get so wrapped up in our FABs (features-advantages-benefits), that our conversations become ***prefab***—prefabricated that is, built on getting through a checklist of things we want to share, of points we want to make about how awesome we are.

Although we seem to forget it at times, a demographic has never bought your product/service, only actual real people have. As Mark Crosling notes, *“Strange as it may seem, a demographic has never pulled out a credit card.”*[43]

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42 entrepreneur.com/article/290410

43 https://www.linkedin.com/advice/0/how-can-you-use-empathy-maps-understand

It’s imperative that now, more than ever, we take the time to really understand our clients and customers, to create offerings that they want to buy and truly support them… not just what we want to push. Not just to react by building “faster horses,” but to take the insights we glean and propel our possibilities forward. So how do we do that?

Two words: Empathy Mapping.

With its origins in the design thinking movement as a tool to better understand user behavior, Empathy Mapping has spread beyond this niche to be a useful methodology for systematically doing deeper client perspective taking.

So, what exactly is Empathy Mapping?

Many in the sales space will be familiar with buyer personas, and will have already built out detailed buyer personas of target clients, perhaps even followed our advice and updated them recently. Isn’t that enough?

In short, *nope*.

Personas do a great job capturing the basics of your client’s personality, crafting a picture that includes elements such as:

- Name (real or imagined) and a bio picture
- Job title/persona group/major responsibilities
- Demographics
- The persona’s interests and personality type
- A defining quote from that persona

They do an awesome job of keeping a snapshot of the customer in the room when we plan and prepare. Where they reach their limit is in their ability to fully capture how a client is feeling in times of change, and how their views and interactions are shifting to adapt. As Alfred Alder put it best,

Empathy is seeing with the eyes of another, listening with the ears of another and feeling with the heart of another…[44]

Empathy Maps are the guide we have to getting there - shortcuts to real perspective taking, not just remembering who the client is, but also how they feel...in the moment.

[44] goodreads.com/quotes/776552-seeing-with-the-eyes-of-another-listening-with-the-ears

To borrow from Crosling again, one of my favorite writers on the topic:

> *Can you see the difference? An Empathy Map provides emotional information and a buyer persona shows the behavioral patterns of a prospective customer.*[45]

Why do you really need an Empathy Map?

Stanford researcher Jamil Zaki notes that:
"Empathy is like a muscle — it can be strengthened with exercise and it can atrophy when idle."[46]

Originally developed by Dave Gray, co-founder of strategy consultants XPlane, Empathy Maps provide strength building exercises for the feeling part of the brain; a way to focus completely on our client's concerns, rather than our own.

How do I make one?

The good news? We can be a bit more straightforward here: great templates exist for Empathy Mapping (give it a Google and you'll find a variety of flavors), but in our view the best place to start is with the CC licensed format designed and refined by Gray.

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[45] linkedin.com/pulse/create-empathy-map-better-understand-your-customers-mark-crosling/

[46] npr.org/2019/07/22/744195502/you-2-0-the-empathy-gym

- **Customize**. B2B vs. B2C vs B2B2C…make this your own. The goal is to step into your client's shoes. If a question/category below does not resonate, then reword it. Add, subtract, and remix until you get something that works for you and nudges you to think deeper.
- **Focus.** When you're filling out your map, be clear on the area where you are diving deeper. We don't need to know how our client feels about everything in their life - we are focused on a particular subset that overlaps with our business area.
- **Combine**. Don't ditch your personas; keep weaving them in to create a more 3D picture.
- **Validate.** After creating an Empathy Map, make sure that your ideas on the Empathy Map represent real clients -check in with them and see if what you say is on point.

The Empathy Map itself:

GOAL

1 WHO are we empathizing with?
Who is the person we want to understand?
What is the situation they are in?
What is their role in the situation?

2 What do they need to DO?
What do they need to do differently?
What job(s) do they want or need to get done?
What decision(s) do they need to make?
How will we know they were successful?

7 What do they THINK and FEEL?

PAINS
What are their fears, frustrations, and anxieties?

GAINS
What are their wants, needs hopes and dreams?,

What other thoughts and feelings might motivate their behavior?

3 What do they SEE?
What do they see in the marketplace?
What do they see in their immediate environment?
What do they see others saying and doing?
What are they watching and reading?

6 What do they HEAR?
What are they hearing others say?
What are they hearing from friends?
What are they hearing from colleagues?
What are they hearing second-hand?

4 What do they SAY?
What have we heard them say?
What can we imagine them saying?

5 What do they DO?
What do they do today?
What behavior have we observed?
What can we imagine them doing?

Download the original from David Gray at
https://gamestorming.com/?s=empathy+map
It is CC licensed and awesome. :)

What differentiates sellers today is their ability to bring fresh ideas.

Jill Konrath
Author of SNAP Selling

How does it work? In short, answer the questions above as best as possible, to step into your client's world. It is structured around three key areas:

- **Clarify goals and focus—** who are we analyzing and what do we want them to do, what does success look like? What does he or she need to do differently or decide?
- **Capture their outside world—** what is visible about the client. This includes what the client sees, hears, does, and says.
- Lastly try to **understand the inside world—** how they think and feel, their pains and gains.

By taking this outside in approach we zoom in, step- by-step, building up a stronger understanding of what moves their minds.

Towards being the trusted guide

Moving from the Empathy to the Trusted Guide Conversation involves moving from stability to possibility; taking what we have and extending it to become more.
This can be a challenge for salespeople with a fixed, prescriptive approach.

To be the trusted guide we need to flex our experience and flex our approach to clients. The well-worn presentation deck or product demonstration is to be resisted, even if the client requests it - and increasingly they are requesting it.

I We You helps us establish a collaborative, participative meeting environment; empathy maps guide towards building a picture of how your client perceives the world.

Becoming a trusted guide involves moving with our client as they develop their forward vision.

A good place to start is with adjusting our mindset. Too many of us spend too much of our time looking for problems to fix. Our language betrays our focus - we talk too much about issues, problems, concerns, and pressures, and not enough about opportunities.

Returning to a point Joshua made earlier, our conversations need to move from *"yes, but..."* to *"yes and..."*

This idea is neatly encapsulated in the concept of **Appreciative Inquiry.** Originally designed for use in social environments, Appreciative Inquiry is now utilized by many leading companies to drive innovation and collaboration. Essentially, it flips the practice of critiquing in order to identify problems to fix and instead looks at celebrating what is done well and asking how to do even better. To illustrate the difference, imagine a question to your client about their experience of recent times:

Typical question:	Appreciative question:
"What problems have you faced in the past year?"	*"What has the business done well over the past year, and what lessons can be learned?"*

More generically, Appreciative Inquiry guides us to avoid overused consultative selling questions about issues, concerns, and problems with the current situation and instead ask questions about future goals, enquiring what needs to be done right, in order to achieve those goals. The information gathered in each case is likely to be very similar, but the feeling of the client will be quite different.

More resources

If you want to know about Appreciative Inquiry, this is a good place to start: https://positivepsychology.com/appreciative-inquiry/

In the virtual meetings, clients typically provide less space for questioning, so it is important that our questioning is positive and focused.

A good way to do this is through the use of the **SHAPE Questioning** framework, introduced in the book, *Smarter Selling*, which is an evolution of consultative selling approaches such as SPIN[47] (pioneered by Dr Neil Rackham), and has a strong focus on understanding future desired outcomes and business priorities. As such, **SHAPE** is well- suited to virtual meetings and plays an important role in understanding your client's [world] [in the new and ever-changing business environment].

Commenting on **SHAPE Questioning**, and the other tools in *Smarter Selling*, Neil Rackham wrote that the book

"...has many useful and practical ideas to help salespeople improve their value-creating capabilities."[48]

[47] routledge.com/SPIN--Selling/Rackham/p/book/9780566076893

[48] https://www.amazon.com/Smarter-Selling-building-trusted-relationships/dp/0273750445

The elements of **SHAPE Questioning** are:

- **Surface** questions - that seek to gather facts
- **Hunt** questions - that seek to understand challenges
- **Adjust** questions - that seek to understand priorities and preferred areas of discussion
- **Paint** questions - that look to the future to understand the positive impact of change
- **Engage** questions - that seek commitment to next steps

A word on "closing"

I hate the word "closing." It conjures images of Alec Baldwin in the movies *Glengarry, Glen Ross* (1992) or Ben Affleck in *Boiler Room* (2000).

The forced close has no place here. If you want to be trusted, you don't use force or manipulation.

With SHAPE, commitment to next steps is natural and typically starts with an Engage question that asks how the client sees things progressing from here.

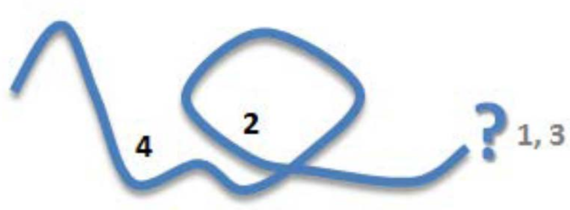
If the response is positive, we might ask what help we could usefully provide.

If the response is non-committal or worse, negative, we need to reflect on the questions we asked, re-group and perhaps circle back to a part of SHAPE that we overlooked.

Where **SHAPE Questioning** differs from other approaches is not only in its greater focus on client priorities (through Adjust questions) and future desired outcomes (Paint questions) but also in the natural way the questions are deployed.

SHAPE Questioning is natural rather than prescriptive. Questions are asked in any sequence and should follow the client's line of thinking, not our desire to move the conversation in our preferred direction.

The chart below illustrates the flow of a conversation that follows a natural and unpredictable path that even doubles back on itself. If we had four questions we wanted to ask, we might only get to ask two of them in the 30 minutes allotted to the immediate call. However, and this is the critical point, because we followed the client's thinking, they will grant us the opportunity to ask our remaining questions by another route, either through email or perhaps on another call.



Of course, not every situation will work out this way. Sometimes we don't get to ask the questions we want...ever. But what we should not forget is the old saying that people like to buy; they do not like to be sold to. And in the virtual world, it is easier than ever for buyers to avoid us if they think they're being sold to.

You can tell whether a man is clever by his answers. You can tell whether a man is wise by his questions.

— Naguib Mahfouz[49]

Decision complexity means that you'll quite likely have multiple people with different interests involved in the purchasing decision. SHAPE helps us work with these varied and different people.

Sometimes a conversation will start with a future orientation, looking at plans for the organization and asking Paint questions to understand the benefits expected from change.

At other times it might be better to ask an Adjust question and jump straight to priorities and then uncover the thinking behind those priorities by asking for facts and the implications of those facts.

Or, if a client wants to discuss current challenges, we can ask a few Hunt questions, then introduce an Adjust question to check the ranking of the various challenges before moving to discuss how the client wants the future to be different, by asking Paint questions.

Each of these scenarios is easy to navigate with SHAPE Questioning.

The skill of the salesperson, and this is the fun bit, comes in deciding what is the best next question to help our client's thought process and deepen our understanding.

[49] goodreads.com/quotes/160726-you-can-tell-whether-a-man-is-clever-by-his

Used well, SHAPE feels comfortable for us and for our client. It feeds our curiosity and our client's, plus it enables us to flex our questioning and craft more engaging discussions with the success of our questioning being measured by the interest generated and our client's desire to move forward.

To become a valued trusted advisor, SHAPE is a good starting point. But the world is complex, especially in these trying times, our clients have complex needs, and we need more tools so that we can vary and tailor our approach. I will never criticize salespeople for their energy and determination, but I will suggest that we do not always work hard enough to improve our skills.

Being a trusted advisor involves expanding our minds - being prepared to have broader, deeper conversations with our clients and being equipped with a broader range of tools to stimulate clients' thinking.

Visit relcap.academy to learn more about SHAPE Questioning and related tools and approaches including:

- Focus-5 to improve commercial focus
- Spicy Questions to remove blocks and encourage "out-of-the-box thinking"
- STEEPLE analysis to anticipate future trends and their potential impact

Guiding for value

Moving from the Empathy Conversation, through the Trusted Guide Conversation to the Creative Future Conversation requires us to broaden the conversation parameters and find undiscovered unexpected value for clients through a conversation that is interesting and informative for them, educational for us, and enjoyable for all involved.

Let’s get the bad news out of the way first. To evaluate how well-equipped we are to engage in Creative Future Conversations we looked at the expressed behavioral preferences of nearly 10,000 sales professionals, financial advisors, and consultants in three key categories:

- Big picture / Detail
- Opportunity / Fear (or caution)
- Free-flowing / Organized
- Scores in each category range from 0-180.
- Scores of 130 or over represent a strong desire towards big picture, opportunity and free-flowing conversations that get stronger as scores increase.
- Scores in the range 85-110 indicate an ability to move easily in either direction.
- Scores of 70 or less suggest a preference towards detail, caution and structure that gets stronger as scores decline.

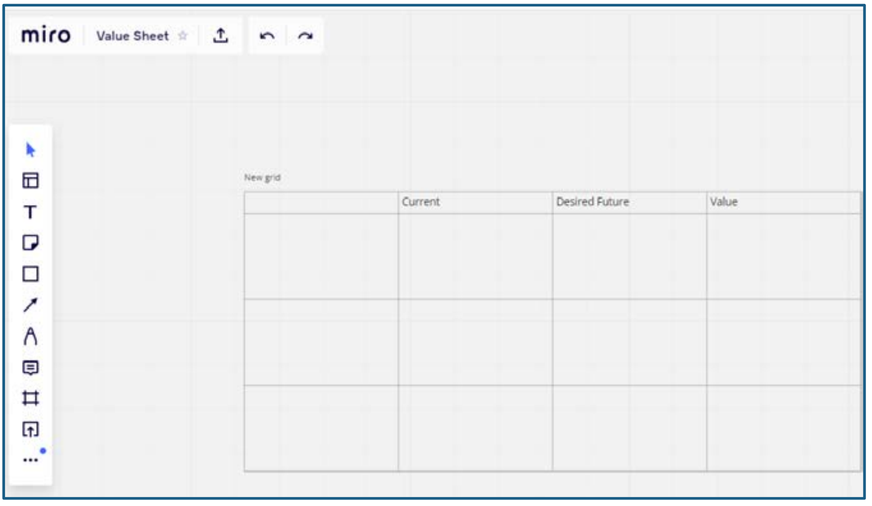
Creative Future Conversations, as their name suggests, tend to be broad brush, big picture, and free-flowing. This chart shows clearly that without tools to help, many people would find it difficult to hold such conversations.

The virtual environment does not facilitate the more relaxed environment in which Creative Future Conversations are more common. In the virtual space, informal conversations that relax and build rapport before the real business starts tend to be less than when face-to- face; it is more difficult to read body language and, in general, conversations tend to focus more quickly on the here and now.

Now the good news...
Let me introduce you to a very useful tool: Value Sheets.

Value Sheets help move conversations from the present to the future and towards creating value. Coupled with SHAPE Questioning, Value Sheets have the power to transform your client conversations and through transforming your conversations, transform your relationships.

Really, they're that good. They're also super-simple to use. Here's how. Using a Miro board (miro.com) or traditional paper, simply draw three vertical lines to separate the screen space into four and note down headings to arrive at something like this:



Don't worry for now about that first column without a heading.

Next, explain to your client that you thought it could be useful to have a conversation about where their team or organization is today and where they want to be tomorrow.

The Current column represents point A: where they are today. The Future column represents point B: where they want to be tomorrow.

The Value column is about understanding the value to them of moving from point A to point B.
Essentially, all business is about moving from A to B!

With the blank Value Sheet in front of you, start at point A by asking how things are right now.
Alternatively, start at point B by asking where they see things being a few years from now.

Then, as you ask questions and your client shares their thoughts, summarize their comments on screen, on the Value Sheet, creating a shared, collaborative record. What is great here is that clients are much less likely to disengage as they feel some ownership of the Value Sheet.

The conversation does not need to be linear - indeed it should not be linear. As thoughts and ideas emerge, you drop them into the space that seems best. Don't get hung up on whether a comment belongs in the Future column or the Value column; that really doesn't matter too much.

There is no right or wrong here. What matters is that you're guiding a Creative Future Conversation, highlighting the value to your client of making changes and co-creating an emergent picture of a brighter future.

How good is that?!
Here is an example of how a Value Sheet might develop:

Current	**Future**	**Value**
- Working from home causing some problems: mistakes; burnout; isolation	- Better technology; guidance for home working; stress monitoring	- Reduced production risk; protect market share

As the conversation progresses, and the blank spaces shout out for attention the picture develops and we recognize where there are challenges. We add in the heading for column 1.

Challenge	**Current**	**Future**	**Value**
- Not fully prepared for home working	- Working from home causing some problems: mistakes; burnout; isolation	- Better technology; guidance for home working; stress monitoring	- Less downtime; improved productivity
- Dissatisfied customers; missed delivery dates	- Pressure on supply chain causing production delays	- Source closer to home; multiple suppliers	- Reduced production risk; protect market share

Ideally, by the end of the conversation, we've thought through, together, each column of the Value Sheet for the areas that interest our client and identified the value to them of moving from A to B. And, if we haven't got as far as we both wanted, we have a great basis for continuing the conversation.

Visit relcap.academy to learn more about using Value Sheets. Try one in your next conversation. We think you'll enjoy the way that it moves conversations into new and interesting areas, positioning you as a trusted advisor.

Typically, the conversation ends with agreement on which of the challenges identified is the most important and/or time critical. This saves us spending time working on a proposal that turns out to not be as big a priority for our client as we imagined. And how many of us have done that in the past!

Try using a Value Sheet in your next conversation, we think you'll enjoy the way that it focuses conversations into new and interesting areas and positions you as a trusted advisor.

Listen

A good questioning approach helps our clients think differently about their situation and gain new insights. But we can't ask questions in a vacuum.

Clients need to feel a level of trust and comfort before they will answer our deeper questions.

That is where **I We You** helps us. They need to see the benefit in spending time with us, which is where **Value Sheets** are so helpful in guiding conversations to areas that hold value.

And we need to listen, no, really listen, to develop a deeper understanding of each client's situation and to demonstrate that we care.

If you make listening and observation your occupation, you will gain much more than you can by talk.

Robert Baden-Powell

Not only that, in a virtual world, where it is more difficult to build rapport and liking, a massive trap awaits those who do not listen. Think about it. We all know when someone we are speaking to is not listening - and we don't like it.

Knowing when someone is listening is almost instinctive. Of all our senses, it is the oldest, learned while we are still inside our mother's womb. It exerts a strong influence.

Unfortunately, the virtual environment is not helpful when it comes to listening.[50] Every person we've spoken to commented that picking up on the subtleties of verbal and non-verbal signals are so much harder in the virtual space. Indeed, researchers suggest that part of the fatigue that comes with virtual calls is because our senses are working so hard, without success, to pick up signals that we can no longer detect.

Reading surveys and reports from business consultancies, the overriding advice for sales organizations is to listen to customers more closely than ever before. This is not particularly insightful. More insightful, perhaps, is the admission of one leader that he needed the people in his business to listen to as broad a range of clients as possible, in order that the business could synthesize a view of the emerging client landscape.

There are challenges here though. While clients clearly value good listeners, sales organizations do not prioritize recruiting good listeners.

[50] sapiens.org/language/nonverbal-communication-online/

LinkedIn's 2020 State of Sales Report[51] highlights that:

- *42% of client rank "active listening" as a skill or trait they want from salespeople, making it the most mentioned.*
- *However, active listening ranks No. 7 by managers in the skills or traits looked for when hiring new salespeople (26%).*

That's the largest gap of any skill between the desires of buyers and sellers.

Additionally, an analysis of LinkedIn Learning courses taken by salespeople in 2019 reveals that less than 1% of learning time was dedicated to improving their listening skills."

The inevitable result is that most salespeople talk more than listen. This truism is borne out by an analysis of over 1 million sales calls by Gong.io that revealed that average performers talk for up to 68% of the time. By contrast, top performers listen 54% of the time and talk for 46%.[52]

While every situation is different, Gong's analysis suggests that listening always beats talking. Extending this line of thought, our experience of the B2B environment is that the more complex the buying decision, the more time the salesperson should spend listening as opposed to talking.

This is especially true for initial conversations and likely to be equally true for initial virtual conversations, even where an existing relationship is going digital.

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51 business.linkedin.com/sales-solutions/b2b-sales-strategy-guides/the-state-of-sales-2020-report

52 gong.io/blog/elements-of-effective-sales-conversations/

Gong’s data-derived conclusions align with academic research published in the *International Journal of Listening* which found that speakers who received active listening responses felt more understood than those who received either advice or simple acknowledgements.[53]

The researchers conceptualized active listening as having three parts:

1. demonstrates moderate to high nonverbal involvement,
2. reflects the speaker’s message using verbal paraphrasing, and
3. may include asking questions that encourage speakers to elaborate on his or her experiences.

Similar to the researchers, we identified six behaviors that contribute to better listening and created the acronym LISTEN to aid memory:

- **L**earn - listening for the broader, deeper picture (including emotions) behind the facts
- **I**dentify - identifying the important points from the many things said
- **S**elf - removing bias and self-interest to better focus on the speaker's words
- **T**ime - giving the gift of time and attention, removing distractions and interruptions
- **E**ncourage - signaling the interest and engagement that encourages further sharing
- **N**ext - navigate moments of distraction or blockage to move to move the conversation forward

[53] https://www.tandfonline.com/doi/full/10.1080/10904018.2013.783344

Learn

People are often more self-aware and guarded in virtual conversations. Roles and responsibilities tend to be more sharply defined. There are fewer opportunities for the casual conversations that might occur over lunch, coffee, or by the drinks dispenser.

We should pay extra attention to words used and any non-verbal clues to identify the emotions that underpin the words we hear.

Questions to ask ourselves:

- Does my client sound emotionally invested, or do they talk dispassionately?
- Do they appear calm, or do they look agitated?
- If one person defers to others on the call, are they being inclusive or are they not interested or not confident?
- How can I check my assumptions? How might I be wrong about them?
- What questions would *they* like me to ask them?

The key here is to really focus on subtext (not just what is being said, but what we think might be felt behind what is being said), assumption checking (not just making guesses, but actively verbalizing our understanding), and rapport building through narrative elicitation (not just logistics, and numbers, but the stories and people behind what is being said).

Identify

Identifying the key points of virtual discussions is helped by the more focused and structured nature of most calls.

Also, there is the capacity to record conversations (see otter.ai for our preferred recording app) which makes it easier to review key points after a call.

Questions to ask ourselves:

- Can I identify, and do I understand, the key points of the conversation?
- Have the key points been summarized and agreed?
- Is there any priority or pattern to the points discussed?

Self

The often-observed self-orientation of many in sales and business development contributes to the yawning trust gap between us and our clients. And it doesn't even matter that we ourselves do not behave this way. Our clients will have met others who do, and sadly, they will associate their behavior with us.

Self-interest and self-focus can manifest in many ways. We must guard against our own cognitive biases such as confirmation bias (where we stop listening because we think we've seen a situation before and know the answer) and liking bias (where we focus on one person to the exclusion of others).

We should go the extra mile to ensure that all participants in a call are shown due respect and are given the opportunity to contribute.

Questions to ask ourselves:

- Have we considered the client team, how to make them feel comfortable, and their desired outcomes from the call? Virtual environments are new for many. They can feel exciting and unnerving. Ensuring we go out of the way to ensure that our buyers feel comfortable goes a long way to establishing a baseline level of trust. Key to this is openness and inclusion. Remember also that key buyers may be influenced by people whose degree of influence may not be obvious from their job title – so respect everyone.
- Have we reviewed our potential biases as preparation for the call? Consider key cognitive biases such as groupthink, liking, and confirmation bias plus social biases and micro-aggressions that potentially exclude or marginalize others such as gender bias and social bias.

  As examples, gender bias could be demonstrated by who dominates the selling team and who they direct most attention to on the buyer team; social bias can be demonstrated in the nature of conversations that exclude certain people (say, those who do not have children), or by something as simple as the backdrop to a video call that illustrates a certain lifestyle that may be unobtainable for others on the call.

Top tip

Setting a loose agenda with times allocated provides a base for keeping on track. See the earlier ebook section: Prepare to engage.

On calls with many people, allocate time management responsibility to someone and then you can privately message them via chat if the agenda time goes astray and they can raise a question about keeping to agenda times to all, using the group chat function or by privately messaging the person speaking.

Time

The key here is not the amount of time. More important is the quality of the time that we commit. That means not being interrupted or distracted. It also means choosing the right time for the person we're speaking to.

We've all smiled at images of children and others appearing in the background of video calls, though perhaps laughed less when it is our own children! Those distractions do not matter too much as long as we stay focused – indeed it can add welcome human warmth to an otherwise cold business call. It makes sense though to control our call environment and remove as many opportunities for interruption as possible.

Most important is that we do not get distracted - by our phone or other devices. If we look away, even for a moment, it will almost certainly be noticed - even if it is just to check the time.

Patience is key. People tend to listen more patiently – at least in the early part of a call – and interrupt less. As the call wears on, and takes up more of our valuable time, we may feel more inclined to interrupt to move things along. Interrupting someone on a virtual call abruptly returns the camera and the focus to you, with your image filling everyone's screens – a highly visual display of taking control. Be aware that this risks displaying impatience and worse, arrogance.

Also be aware that the natural pauses that occur in face-to- face situations are amplified in virtual meetings and there is a temptation to talk more and faster to fill any empty spaces. Leaving pauses, for participants to digest what has just been discussed, is important.

Questions to ask ourselves:

- Have I dealt with all potential distractions and interferences?
- Is now a good time for my client, and for me?
- Are my team and I clear that we must leave sufficient time for our clients to speak and to reflect?

Encourage

Some things are better in a virtual conversation, some or worse. Meetings tend to be more focused in terms of time but more challenging in terms of maintaining everyone's interest and participation.

In a video meeting, we typically leave our video camera running to display that we are present. Our challenge with this is that it is then too easy, especially on a group video- call, to say our piece and then mentally retire into the background as someone else speaks. I'm not talking complete disengagement, just that mental sigh when we downgrade our attention a notch or two.

Unfortunately, others on the call are likely to note that we've disengaged just a little, and this can prompt them to disengage a little, too. This then gets noticed by others on the call and can impact general levels of energy and participation.

Because the environment is both different and encouraging, it pays to consider the options we have at our disposal when entering a call that we can use to encourage participation:

- Use chat and whiteboard functions to invite comments and questions.
- Think about your non-verbal behavior and make an effort to nod and smile (appropriately!) when another person is speaking.
- Remember to pause. When your client has spoken, take a breath, count to 3, absorb what has just been said.
- Occasionally ask a question to clarify understanding – if only to give the speaker a chance to pause for breath!
- Invite quieter people to participate with broad, open questions e.g. "Jed, what strikes you about the points we've discussed so far?" or "Susan, what would you add to the comments made already?" One advantage of virtual call culture being that it is generally much more acceptable to call people out by name.

Questions to ask ourselves:

- What questions can I prepare before the call that will encourage participation?
- Who has not spoken yet, or not for a while? What can I ask them?

  Tip: An easily answerable question is to ask if someone has anything to add to the last comment. A safe question as they can say yes and add, or say no and not lose face.
- When was the last time I smiled, nodded, or showed some sign of life?

Next

Occasionally, even in focused virtual meetings, silence descends. More often, someone talks for what seems an age on a topic that is already understood, or not as important as the speaker clearly believes. When this happens, attention and concentration tend to waiver and listening deteriorates. The temptation to glance away and check messages becomes irresistible!

Oscar Timboli writes in *Deep Listening* (2019) that most people speak at between 125 and 150 words per minute, while we listen at up to 400 words a minute. That leaves a lot of room for mental distraction. Oscar advises us that:

> *Poor listeners and great listeners will always be distracted - great listeners notice when they're distracted quicker.*[54]

So, the first step is to learn to recognize when your mind is about to wander. Then what? Well, one thing we can do, to stay engaged, is to ask yourself questions about what is being said:

Why is this person so enthusiastic about this point?

How does it link to other points?

How does it contribute to the core subject of our conversation?

And a second step is to think and ask about what is not being said:

What else do you think about this point?

How does it link to other points?

How long have you been thinking about this?"

[54] https://www.oscartrimboli.com/product/dlbc/

If the topic of conversation is unproductive (for both parties) we might also need strategies to move on - especially where time is limited.

If we've agreed an agenda with times (see the earlier section on Prepare to engage) and have a timekeeper, we can drop our timekeeper a private message asking how the session is running and whether there is time to cover all agreed topics. A riskier option is to put the same question to the person speaking, though preferably as a private chat message!

We could also ask a question in the general chat that starts with a compliment or insightful remark. Something like

"This report is really interesting and I think I understand more the challenges the team faces. How about everyone else?"

A third option is to show that we're listening (which shows respect) by summarizing areas discussed (again, possibly using the chat function), then ask what else needs to be covered.
For example:

"We've discussed the current situation and heard some good ideas from Will on options for moving forward.
Should we continue on this or are we ready to move on to discuss actions and timelines?"

Questions to ask yourself and others in the conversation:

- How does the topic being discussed contribute to the goals of the conversation?
- What question should we/I ask to re-engage interest?
- Have we covered all the points on our agenda?

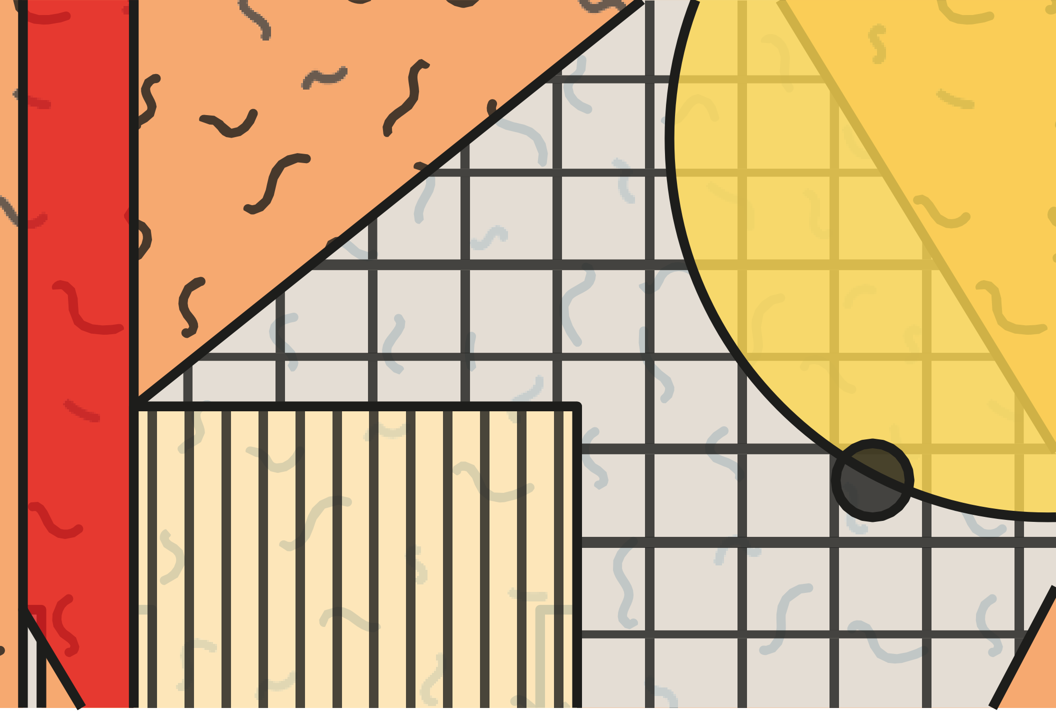
Using LISTEN

As noted earlier, we listen instinctively. Our attention wanders because we listen faster than we speak, and the best way to be a better listener is to be more self-aware.

We've found that a simple LISTEN checklist can help hugely, at least in the early stages, of our journey to being better listeners.

Noting down all the letters (to remind ourselves of each element) and circling any element that is of particular significance for us, helps to keep listening in a corner of our consciousness during conversations - and as a result we focus more and listen better.

To further develop your listening skills, access the Deep listening application canvas at relcap.academy.



6. The end and beyond…

All meetings come to an end. Virtual meetings tend to be shorter. Good for productivity, not necessarily good for your health, as we jump into our 7th back-to-back Zoom of the day.

Be sure to set aside some down-time between conversations. Not just to take stock of the last conversation, but also to give yourself a break. One client we spoke with encourages 25-minute virtual meetings with a 5-minute recovery time between calls.

Salespeople will have to continue to raise their game and improve their skills or they will risk being dis-intermediated and replaced by intelligent bots.

Phil Garlick

Chief Sales Officer, BrainShark

After the conversation

If you've managed your conversation well, it ended with a summary (and preferably agreement) on the key points discussed and a discussion of what happens next. Having done this, the final step is to record the key points discussed to circulate to those who attended and to have a record available for those who may be involved later - remembering how complex buying decisions have become.

Perhaps the easiest way to share the points from a discussion is simply to record it (with all parties' consent, of course), and after the meeting, send a link to the recording.

The easiest yes, but not the best for the receiver. How many times have we been sent recordings of meetings and been asked to listen to the whole thing, only to find that the part we're interested in is 25 minutes into a 45-minute conversation.

If we're going to send a recording to someone who matters, we should accompany it with a note of the timestamps for different segments so that they can skip to the parts they want to hear. This shows respect for the other person's time and will be appreciated.

For some conversations, recording is not such a good idea. Is it culturally acceptable? Will recording the conversation make some people less willing to contribute, or speak openly about important but sensitive topics? Does recording the conversation put you under pressure to perform or to behave in a way that prevents you being yourself?

We find that recording is good for team and project discussions, but less helpful for sales calls. For these calls, brief written notes of the key points discussed are better. One reason is that by writing a short summary, we demonstrate that we've listened, and as we know, everyone likes to be listened to!

If we use a **Value Sheet** in our conversation, that can serve as a record of the key points discussed. In some cases, a **Value Sheet** together with a note of the agreed next steps will be enough. In other situations, especially where people who were not in the conversation need to be briefed, something with more detail is preferable.

For some time now we've been using an email format that we call a **CC Note** to summarize key points discussed, request input and outline next steps, all i n a way that builds collaboration and demonstrates customer focus. **CC Notes** should be short and easy to read, *clarifying* the key points discussed and *confirming* the agreed next steps.

The format of a **CC Note** looks like this:

- **Recognize** or thank the person for the discussion and highlight a point of interest. E.g. "It was good to catch up today and hear the plans for your firm's new product."
- **Establish** the purpose of your note.

  E.g. "We discussed many topics, and I thought it useful to note down my understanding of the key points and check them with you."
- **Request feedback** – which adds to the sense that this is a shared record of a shared conversation.

  E.g. "As you read through, please add your thoughts and let me know if I've missed or misunderstood any of the points we discussed."
- Then **summarize** the key points discussed – in bullet point format, not paragraphs. Bullet points are less formal and more collaborative (plus readers pay less attention to grammatical errors!). If sensitive topics were discussed, we can choose not to include them in our **CC Note** – the other person can always suggest adding them if they want to. As much as possible, we should lead with and try to keep the focus on what the other person said – to show again our interest in them and their thoughts. Also highlight points where there was agreement. We should avoid too much use

of "I", "me," and "us," instead aiming to use phrases like "you said," "you explained," "you stated," and "we agreed." And if we use "us" we should check to make sure that where we mean us and our client, as opposed to us and our team or organization, the meaning is clear.

- End with a note on next steps, and where possible, try to include actions that both parties will take. If we are the only one taking steps, we aren't walking together with our client!

  E.g. "In terms of next steps, you agreed to provide more information on the dates and locations of the product launch; I agreed to come back to you with costs and delivery dates for product distribution."

Top tip
Before sending a **CC Note**, count the number of times you've referred to yourself or your organization and the number of times you've referred to your client. The balance should always be in their direction.

How soon after a conversation should we send a **CC Note**? You know the answer – as quickly as possible. The same day.

Part of the value of sending **CC Notes** is to demonstrate that the other person, and their ideas, are important to us.
Sending our summary soon after a conversation signals this importance, so if making an impression is important, we should do it fast, not least because we never want to miss an opportunity to show our clients that their thoughts are important to us. Every action that illustrates this helps to differentiate us.

Remember the Dov Siedman quote from earlier?

"There is one area where tremendous variety still exists, however, one place that we have not yet analyzed and commoditized, and which, in fact, cannot be commoditized: the realm of human behavior – How we do WHAT we do.

The tapestry of human behavior is so varied, so rich, and so global that it presents a rare opportunity, the opportunity to outbehave the competition."[55]

Short, accurate **CC Notes** sent on the same day as a conversation, frequently get an immediate response. Sometimes just a thank you, but often something more such as a comment on the speed of response or the accuracy and helpfulness of the summary.

We sometimes forget that for our clients and customers, it can be a tremendous value for our clients to have someone with a different perspective work through our thoughts with us, and then provide a clear summary of what was discussed.

For more on **CC Notes** access the Clarify understanding and confirm next steps with CC Notes application canvas at relcap.academy.

[55] https://www.amazon.com/How-Why-Anything-Means-Everything-ebook/dp/B005OKPDS0?ref_=ast_author_dp

A final word - measure what matters

We're confident that if you adopt a genuine helping mindset, and use the tools we've introduced, you will be successful in the virtual environment. However, to understand, adjust, and prove the success of your approach and the tools you use, you need to measure the impact of your behavior and demonstrate progress.

Measuring progress towards sales goals is critical - not only so that you keep your job, but also to keep yourself motivated. The path we're advocating, towards being the trusted advisor to your client, is not always easy, especially in times of economic difficulty when the temptation, and often the direction from above, is to turn the wheel harder and faster. We're not denying the need to sell to stay alive in hard times, but we must always remember that the clients we push today, when they do not appreciate being pushed, will not take our calls tomorrow.

In this regard, traditional measures of sales effectiveness do not help. They're too crude and too blunt to address the current, fluid business environment.

Traditional measures that include number of calls, emails sent, proposals submitted, win ratio, growth per account, volume of sales, value of sales, profit margin, market share, share of wallet, etc. tend to be current or backward looking and are a hangover from the transactional nature of 20th Century business relationships.

Today, our clients are looking for more collaborative and strategic relationships where we help them imagine their future, spot opportunities, address challenges, navigate complex markets, and chart a path to their better place. New systems, promoted by technology companies (with no vested interest at all!), focus on measures such as conversion ratio (leads converted to deals), stages of the cycle, days in each stage, and days to deal signing (sorry I can't bring myself to use the word "close!").

What is striking about these measures is that they remain primarily quantitative (all about volume and numbers) and still lack predictive power. Each scenario is different, so while knowing more about the sales cycle may help us plan for cashflow, it does not help us progress the sale.

One reason these measures are popular is because they are relatively easy to monitor, automatically, with very expensive technology. An enduring irony of corporates, highlighted by the Challenger Sale research in 2010, was the money invested in CRM systems (chasing the panacea of a technology solution to magically solve all their sales challenges), marketing and branding (to feed the egos of senior executives), versus investing in developing the skills of the salesforce, which was shown to be the overwhelming driver of customer loyalty.

Social media and virtual selling may have changed the landscape in the years since the Challenger Sale research, but we should not forget the research finding we mentioned earlier where more than 90% of respondents agreed that there is usually or always one member of the buying committee who tries to influence the decision their way - and that 89% of respondents said that this person is successful most of the time. Relationships still matter. While traditional measures will continue to be used, more organizations are beginning to realize that forward looking relationship indicators and measures of relationship activity help with predicting future success. Relationship measures can be quantitative, such as:

- number of contacts in an organization
- number of conversations

And also qualitative:

- spread of connections between seller and client (one- to-one; one-to-many; many-to-many)
- duration of conversations
- share of voice during calls (%)
- who attends – buyer side and seller side
- who initiates the conversations
- topics discussed
- questions asked
- desired goals/outcomes/needs stated

Tools like otter.ai that automatically record transcripts of Zoom video calls make it relatively easy to review conversations for key relationship metrics and of course for coaching performance.

Other tools such as Cyrano and Cogito go a step further and attempt to assess the emotional state or EQ in a conversation. As more and more conversations move into the virtual space, we can anticipate an explosion in the number of tools that analyze calls and give feedback on best practice.

Gong.ai has been a front-runner in sharing insights from their analysis of consumer calls and there are lessons in their findings.[56] For example:

- Share of voice (%). Gong found that for top performing salespeople the talk:listen ratio is 46:54, while for the bottom performers the ratio is 72:28.

- Questions asked. Star Reps asked 28% more questions during sales demonstrations than Average Reps. They also ask 30% fewer questions than Average Reps. According to Gong, they're giving prospects just enough information to spark their curiosity. Just enough to provoke questions. We should always remember that buyers like to buy, they don't like to be sold to – hence arousing curiosity and answering buyers' questions will always trump a show-up, throw- up pitch.

Adopting relationship measures to complement traditional measures has three great advantages:

1. The measures are indicative of the general health and sustainability of the organization – vital for the modern world of business where unanticipated shocks are becoming more common.

2. Organizations can self-monitor the effectiveness of different measures, aligning relationship measures with future sales revenues to determine the relevance of specific relationship measures in predicting future business.

3. The relationship data collected can be used to coach sales teams on the behaviors that lead to future sales – specifically to better prepare for conversations.

[56] gong.io/blog/elements-of-effective-sales-conversations/

The first half of this decade has focused our minds on how we work with our clients and customers.

For many it was a time to pause and reflect. Our sincere hope for all of us who work with clients is that we are more empathetic, future oriented, commercial and with new skills and tools. That's our hope.

We also humbly hope that the tools and approaches described in this ebook, to support the move to being a trusted advisor, are useful to you as you move forward.

David and Joshua

Who's responsible for this?

David Lambert: Originally from the UK, David Lambert has spent the last 25 years in Hong Kong. He worked for a time with PwC balancing client assignments with leading their business development, marketing and latterly, the loftily titled PwC Leadership Academy.

Back in 2007, he co-authored ***Smarter Selling*** with his good friend Keith Dugdale, and was an early advocate of relationship capital, T-shaped advisors, empathy and the importance of behaviors in building strong and sustainable relationships. David works in a comfortable home- office, with a decent coffee machine and a view of the sea, helping organizations build trusted virtual relationships.

He can be reached at david.lambert@relcap.academy.

Joshua Davies: Let's talk in the third person, shall we? Originally from Honolulu🌋, Joshua Davies has spent the last 20 years working internationally, with the last 15 based in Asia. He heads up the firm Knowmium, serving as lead Conversation Architect. In his spare time, he enjoys running (slowly) on Hong Kong's trails, photography (less slowly), and reading more books than all the time left in the universe will allow.

He can be reached at joshua@knowmium.com or on LinkedIn at linkedin.com/in/joshuadavies. *Say hello maybe?*

relationship capital academy

What we do

As individuals, we have knowledge and expertise, but few of us succeed alone. We get things done and create value through leveraging our personal relationships.

Similarly, organizations create value through their relationships - with customers, clients, employees, suppliers, regulators and communities - leveraging employees' personal relationships in the process. The sum of a person's or organization's relationships is their relationship capital.

The Relationship Capital Academy trains, coaches and provides the measures, tools and skills that build relationship capital, powering the growth and development of people and organizations.

Who we work with

We work with leading companies across industries and across boundaries. Anywhere that relationships are more than transactional.

Intrigued?

Find out more at relcap.academy

What we do

Conversations matter. If we are what we say, what do your interactions say about you? Whether presenting to a meeting or conference, negotiating a new contract face-to- face or via video conference, or moving minds within your organization: the way we wield words is constantly opening and closing possibilities around us. When a door shuts, we have this sense that the encounter has led almost inevitably to that moment—but every conversation is multiple possible conversations. Small framing pivots, tiny perspective choices that demonstrate true engagement, can shape entirely new avenues for growth.

At Knowmium, we study the "how" of deeper talk—unpacking fossilized speech patterns and crafting new habits that build trust and collaboratively solve problems.

Who we work with

We collaborate with Fortune 100s and non- profits in 33 countries worldwide…virtually, to help their interactions become more meaningful.

How can we help *you*?

Say hello at knowmium.com

A huge & humble thanks!

Many thanks to our awesome editors and friends Robert Kienzle and Paul Neale for finding approximately 105 typos, our many beta testers, and the sales thought leaders who inspire us.

Don't try to win over the haters; you are not a jackass whisperer.

— Brené Brown

There is more…

This ebook covers elements in a comprehensive conversation architecture that helps build trusted relationships in business. Relationships with clients, customers, colleagues, stakeholders and suppliers. The strength and power of a person, team or organization's relationships we refer to as their 'relationship capital'.

Intrigued? To find out more about how to measure, grow and leverage your relationship capital, visit relcap.academy.

For help on specific relationship-building skills, check the list of 'wants' below, then click on any 'wants' that look interesting, to explore the related application canvas and learning resources available at relcap.academy.

Each canvas module in the academy includes short videos, notes and a case-study explaining how to use the canvas.

I want to…

- get feedback on my current relationships and ensure they're strong
- build a deeper understanding of each buyer and how they perceive value
- approach conversations with patience and an open mind, putting aside judgements and preconceptions
- understand individual buyer's behavioral preferences to better build rapport
- secure conversations by generating curiosity and interest
- create an environment where people WANT to speak with me
- look great, sound excellent, and replicate face-to-face presence on virtual calls

- ask questions that engage buyers in interesting, insightful and informative conversations
- be seen as commercially astute – someone with useful insights and perspectives beyond my technical specialism
- manage conversation flow and focus on delivering value to buyers
- get an overall sense of how to guide and manage my virtual conversations
- broaden the range of topics I can discuss to look further, broader and deeper
- ask questions that lead to unexpected insights and perspectives
- listen better and be viewed as someone who listens well
- record and share key conversation points to drive collaboration
- position my ideas and offerings in such a way that buyers see the value and commit to moving forward
- convince buyers with compelling examples of how my offering delivers tangible benefits
- be ready and equipped for queries and questions
- handle unexpected queries and questions confidently