What You Present: The Messages

1 Make It All About Them

Myth: It's all about us.
Truth: It's all about them.

The most common misconception about the sales presentation is that the prospects want to hear all about us, the company presenting: our size, our clients, our products, our people, and our awards. In fact, this is so ingrained in corporate sales culture that clients actually feed into these misconceptions—so much so that they provide direction or issue agendas that make everyone think that they want the presentation to be all about the firm that is selling the products and services. They ask us to explain our products and services, they ask us to tell them how we are different, and they ask us to tell them about our processes and systems. Yet, in reality, clients want the presentation to be about *them*. They want to hear how we are going to help them to solve their problems, address their needs, and seize their opportunities. They want to be the center of the story. Think about it: Most of us have been on the buying side at one time or another. A sales presentation that is all about the vendor and the product is a big bore. A sales presentation that focuses on the audience and their problems, on the other hand, is engaging.

Recently, my husband and I interviewed financial advisors. We were rolling over a 401(k) from a previous employer and thought it

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would make sense to consolidate our investments. We interviewed two advisors, and the contrast between the two was notable. We spent considerable time reviewing our situation with each, and the first began his discussion with an overview of his background and his firm's capabilities. He then said that he had looked at our portfolio and would recommend several mutual funds based on his review. He went on to talk about the funds—their track record, management fees, and so forth. In contrast, the other advisor started by confirming what he knew about our particular situation and then continued with a series of questions. He asked us to talk about our biggest short-term concerns and our vision for the future. At the end of this, he summarized our situation as if he had known us for years. He went on with several recommendations, tying them into our needs, fears, dreams, and realities. When he left, my husband and I knew he was the guy for us. It didn't really have much to do with his recommendations (although they were certainly on target). Rather, it was his ability to demonstrate that he understood what was important to us—after just one encounter—that impressed us so greatly.

My colleague Kent Reilly brings the concept of making it all about the client to life with the following analogy that I have borrowed many times. Imagine that you ran into a friend after a party that you had both attended. He whips out his iPad to show you pictures from the party. As you scroll through, Kent asks, which pictures do you think will most hold your interest? If you are like most people, you will answer—pictures of you!

Maybe you can better relate to a situation in which a host at a dinner party offers to share the family vacation slides (yes, one of those), and you have that sudden and urgent need to get that extra glass of wine to help you through the next 20 minutes. Do you think you would feel differently about those slides if you had been along on that vacation? Of course you would. Stories, like slide shows and photo albums, are much more interesting to you if you are in them.

This is why we need to make our clients the stars of the photo album—and then show them how we fit into their pictures, not the other way around. In short, *we need to make it all about them*.

"Ok, enough about us, what do **you** think about us?"

Old tradition: Begin the content of the presentation with your stats.

New tradition: Begin the content of the presentation with their needs.

Because so many people think that clients want to hear all about us, the tendency is to kick off the presentation talking all about us. I have seen far too many introductory slides with bullet points detailing the company's history, scale, and clients. Is this the most important and engaging information that we can give the client during those critical first few moments of a final presentation? Of course not!

I have heard Eric Baron, president and founder of The Baron Group, a sales training firm in Westport, Connecticut, suggest many times that clients' first inclination to buy happens when they believe that the salesperson understands their needs.

I think we can all relate to an experience where we have been the prospect—whether we are buying a house, a new TV, or the services of a financial advisor. You know, that moment where the salesperson just seems to get what is important to you?

For example, I was recently in the market for a dishwasher to replace the dish drawers that we had installed in our kitchen about eight years ago. I thought this was going to be a pretty easy purchase—and I was completely wrong. After visiting several appliance stores and a couple of the big-box stores, I found out there are a lot of bad dishwashers out there. While checking reviews on the Internet, I happened across an online appliance store and decided to call. The salesperson began by asking me why I was in the market for a new dishwasher. I told him that my current dishwasher needed too many repairs and I was tired of all the service calls. He then asked me several more questions. After about 10 minutes, he said something like, "So, with two teenage boys in the house and a husband who loves to cook, you probably can easily run that dishwasher a couple of times a day. You also do a lot of entertaining, and the last thing you need is for the dishwasher to give out right before a holiday, like it did for you on Thanksgiving. Given how you describe your kitchen, I imagine that the style is important to you as well, am I right?" Bingo! This salesperson had obviously been listening—and had clearly understood my needs. I was now inclined to buy.

He went on to strongly suggest that I rethink my target price upward to buy what he considers the best dishwasher on the market—which cost about twice as much as the dishwasher I thought I would buy. I gave him my credit card information, and my new dishwasher arrived the next day. I couldn't be happier with it—and with my entire buying experience (in case you are wondering, it is a Miele).

This story illustrates how important it is to frame everything in the context of the prospect's needs. The first order of business in the sales presentation is to confirm those needs, because this frames the rest of the presentation.

I am going to assume if you are reading this book that you are well versed in the importance of eliciting as much information and insight as you can about your clients' needs before you present any solutions to them. In a complex sale—where the sales cycle is typically long—this process is likely to occur over time through research, analysis, and a series of contacts with the client. Your understanding and insight into the client's situation, problems, and needs provides a critical foundation to an effective sales presentation. Failing to do this puts you at a significant disadvantage.

Companies often retain my firm, Precision Sales Coaching and Training, to help coach a team through a sales presentation. When structuring the presentation, we always ensure that the team begins their discussion with their analysis of the client's needs, problems, and opportunities—demonstrating that they understand the client company and that this discussion will be all about addressing its needs. In other words—it will be the *client's* photo album, not ours. We encourage salespeople to put the client's needs into their own words so it does not look like a cut-and-paste job from the RFP, but rather a thoughtful reflection of their understanding and insight into their needs—something that adds value right off the bat.

Note that this is only an expression of clients' needs; it does not and should not include your solution to their needs. It is the frame for the discussion—a photo of the clients without you in it. I sometimes think of it as a contract between you and the clients stating why you are there and what you will be discussing.

Later in the book, you will find out how negatively I feel about text-heavy slides. However, I make an exception with these kinds of needs-related slides, because the words and their meaning are so critical. It is important, however, that you preface this portion of your presentation carefully and deliberately by saying something like this: "Before we begin, I would like to review our understanding of your situation and needs. Everything that we talk about today is about addressing these, so it is critically important that we get this right. I am going to ask you to pay close attention as I review the next slide, which is a series of bullet points. Afterward, I will ask you to tell me what, if anything, we missed or what we may have misinterpreted."

This type of preamble does a few things:

- It demands audience attention. You have said that it is "critically important," which are words that get most people to focus.
- You have specifically asked the audience to read along with you—for just a few brief moments. This instruction engages them in the content and sends the message that you will not be reading to them the entire meeting.
- It encourages the audience to really tune in to what you are about to say, because you have given them a heads-up that they will have a speaking role in a few minutes.
- It sends a very strong message that this presentation is about them, not a 60- or 90-minute infomercial all about you. They are going to be the stars of this show.

We occasionally get some resistance when we suggest this approach to sales teams, which can come in the form of the question, "What if we're wrong?" This is particularly concerning in sales situations where an intermediary is involved, thereby limiting direct access to the clients.

My response is simple: "The clients will correct you." And it's important that you allow them to do so by asking them for feedback after you have reviewed your understanding of their needs. Be sure to encourage their response with a statement that invites discussion, similar to the following examples: "I'd like to pause here and ask you for some feedback." Or, "I'd like to hear your reaction to this." Statements like this will encourage clients to share information with you, as opposed to something more close-ended, such as, "Is this accurate?" (to which they can reply with a simple yes).

Often, you will gain new insights as they share their reactions—something that is particularly helpful if you are presenting after your competition has presented. The members of the buying committee are likely to have been influenced by things that they have liked or haven't liked during previous presentations. It is common for you to get a glimpse into their current thinking if you prompt them effectively—which can be gold to a sales team, because they can then adjust their comments directly to the client's newly acquired hot buttons.

This happened to me recently. We were the last of three vendors presenting to the buying committee of a small international bank that wanted to provide its bankers with sales training and coaching. We had done what we thought was a very thorough needs analysis. After reviewing our understanding of the client's needs, we paused and asked for feedback. The most senior member of the group shared the following: "We think our people struggle with time management." We asked him to elaborate. He told us that one of our competitors had talked about time management often being an issue with salespeople.

Well, time management was the last thing that we would have brought into this presentation had he not mentioned it. But this newfound knowledge allowed us to discuss how we address time management issues in our training programs. Had we not asked the question, we would never have known that the buying committee had identified and rearranged their priorities during the sales presentation process. They might have even decided to go with another vendor in this situation, assuming (incorrectly, of course) that we could not address their newly identified need for improved time management.

When buying committee members accept your invitation to add to or elaborate on the list of needs you've provided, it is critically important for you to accomplish the following:

- *Make sure you understand exactly what they are saying and why it is important to them*. When appropriate, ask them to elaborate or give a bit more detail on what they said. Ask follow-up questions so that you know how to address the need as you move forward in the presentation. This also demonstrates to the clients that you genuinely care about—and are paying close attention to—everything they have to say.
- *Capture the need so that you can refer to it later in the presentation*. In advance of the sales presentation, you may want to appoint one of your team members the role of ensuring that you address any new needs that surface somewhere in the body of the presentation.

- *Acknowledge it, but do not address it.* The objective of this exercise is to agree on what the clients' needs are and therefore what you will discuss in the meeting. All you need to do at this point is to thank them for their input, demonstrate that you heard them, and assure them that you will address it. For example, if a client were to say, "We also need to be certain that our current system will be compatible with your systems," the salesperson might reply, "Yes, compatibility is important to a smooth transition, and we will be certain to talk about how we interface with systems like yours when we get to technology. Thank you, Erin. Anything else?" Ideally, the salesperson or the person covering technology will circle back at the right time in the presentation and say something like, "Erin, you had mentioned in the opening that you were particularly interested in systems integration. . . ." After the session, he or she might then check in with anyone else who had questions that needed to be addressed.

If You Remember Only Three Things:

1. Begin every presentation by expressing your understanding of the clients' problems, needs, and opportunities.
2. Review each with them, explaining that since these are the basis for your presentation, you want to make sure that you have them right.
3. Elicit and take note of their feedback, and refer to it, as appropriate, during the presentation.

CHALLENGE

Begin your next presentation with your understanding of the client's problems, needs, and opportunities. Listen intently to the responses, and customize your comments throughout the presentation to what you have learned.