



## Where Marketing Meets Selling

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## Agenda

- Dependency and differences between marketing, sales, and service
- Essentials of a sales process
- Tools
- Call/meeting preparation
- Conducting a meeting
- Call/meeting follow up

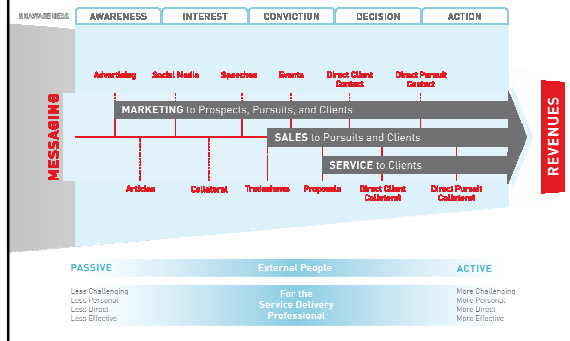


## The BD Problem Statement

- Unclear definitions about marketing, sales, AND service
- Differing opinions and natural (or created) barriers to integration

## Business Development

The Successful Integration of Marketing, Sales, and Service



## The Function of Service

- Uncover needs
- Meet the needs of the client
- Create value
- Build relationships



## The Function of Sales

- Uncover needs
- Meet the needs of the client
- Create value
- Build relationships

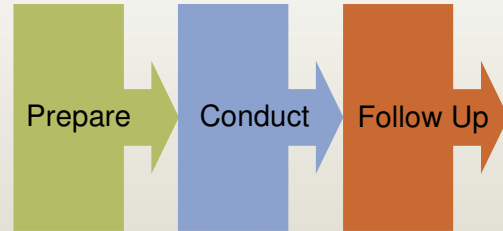


## Process is Important

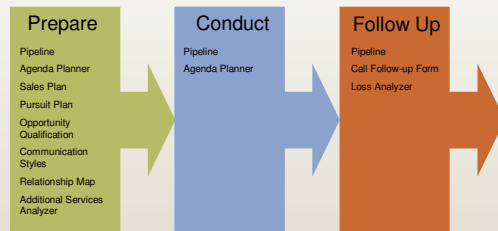
- You cannot manage what you cannot measure.
- If you do not know what it is, you cannot measure it.
- If you cannot measure it, you cannot understand it.
- If you cannot understand it, you cannot improve it.



## Sales Process



## Sales Tools



## Planning for a Call

- You prepare so you have substance to cover during the meeting.
- If you're not prepared, you waste the prospect's time and you waste your own.



## Planning for a Call cont.

- Objective of the call
- What do you want the outcome of the call to be?
- How can you catch their attention?
- What do you want to learn?
- What does the client want to learn?
- What actions do you want the client to take?
- What messages and evidence do you want the client to have?



## Prepare: Call Planning Form

- Have you ever been invited to a meeting only to learn that everyone there has no idea why they are there?
- This tool supports pursuit planning and covers our selling principles
- This tool will help you think about how we spend the most valuable commodity: Time

Call Planning Form	
DATE:	
PROSPECT NAME:	
CONTACT NAME:	
PHONE:	
EMAIL:	
CALL OBJECTIVE:	
CALL AGENDA:	
QUESTIONS TO ASK:	
KEY MESSAGES:	
EXPECTED OUTCOME:	
PREPARED BY:	
DATE:	

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## Conduct: Agenda Planner

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## Mutually Developed Agendas

- Helps you get a client or prospect vested in the time they devote to your meeting
- Organize and prepare with agreed-upon topics clearly outlined before you sit down with the client or prospect
- Minimizes guessing
- Client-focused leave-behind or follow-up
- Agree via e-mail or use one of the firm's pre-printed agenda planners!

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## Conducting the Call

- Ask questions: The purpose of asking questions is to uncover information
- Two types of questions
  - Closed-ended: Confirm understanding. Front-end and back-end
  - Open-ended: Discover information. Right down the middle
- Questions of SCOPE and PRICE

S – Services	P – Problem
C – Criteria for Success	R – Results
O – Outcomes Desired	I – Issues
P – People	C – Constraints
E – Expectations	E – Evidence

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## Table Discussion

- Build your own questions of SCOPE and PRICE as a "table"
- Share

S – Services	P – Problem
C – Criteria for Success	R – Results
O – Outcomes Desired	I – Issues
P – People	C – Constraints
E – Expectations	E – Evidence

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## Conducting the Call

- When do I get to talk?
  - When you believe and the client has confirmed that you understand the "problem"
  - When you can focus what you will say on the problem
    - No "show up and throw up"
    - Be relevant or be relegated
  - When you gain permission

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## Your Conversation

- How your meeting should go...
 

Talking about YOU

Talking with THEM  
(Listening and Asking Questions)



## Some Meeting Guidelines

- Don't assume!
- Go deeper: Ask what evidence supports their statements; is there any?
- Are you covering your/their/"our" meeting objectives?
- What are your/their/"our" **next steps**?  
(If you don't set these, then your meeting was probably a waste of time)



## The Sales ROAD

- R – Restate and Clarify Needs
- O – Offer Solutions
- A – Address Concerns and Objections
- D – Decide on Next Steps



## The Sales ROAD cont.

### **R**estate and Clarify Needs

1. Restate your understandings of the client's needs. "*It seems that you...*"
2. Ask a question to test your restatement. "...is that correct?"



## The Sales ROAD cont.

### **O**ffer a Solution

- Presenting price
- Trial closing questions:
  - Facts
  - Feelings
  - Attitudes



## The Sales ROAD cont.

### **A**ddress Concerns & Objections

- Kinds of Objections
  - Stalls
  - Flats
  - Roadblocks



## The Sales ROAD cont.

### **A**ddress Concerns & Objections

- How can you address and overcome objections without either backing down or being argumentative?
  - Empathize/acknowledge
  - Analyze
  - Formalize
  - Summarize

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## The Sales ROAD cont.

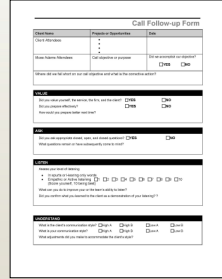
**Decide on Next Steps**

- Closing Questions
  - Alternate of choice
  - How we proceed?
  - Assumptive close

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## Call Follow-up Form

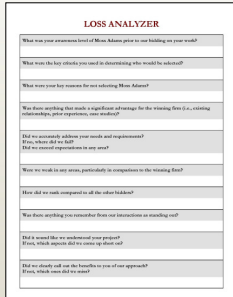
- This form helps you evaluate the effectiveness of your sales call and plan your next move
- You will gain a better understanding of what you actually accomplished on your sales call and have a better understanding of the client or pursuit
- Did you accomplish what you went there to do?



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## Loss Analyzer

- A loss almost always means "not now;" it rarely means "never."
- You can achieve stronger relationships through failure than success if we have the ability to recognize and own the failure and take responsibility.
- It is vital that the P/SM find out why they lost so we have the information we need to correct ourselves when the next opportunity arises.




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## Pipeline

- A tool for managing, and providing visibility for, the focused pursuit and winning of our most desired engagements
- Helps firm management hold offices, managing partners, and pursuit leaders accountable for maintaining proper focus on these pursuits

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## Pipeline cont.

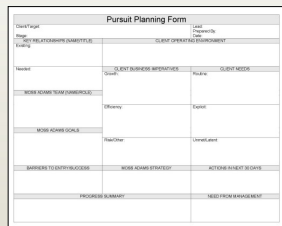


Modified	Company	BSC	Status	Industry Group	Pursuit Leader	Last Contact	Next Contact	Notes
2/22/2010 9:15 AM	ABC Company	Yes	Pursuit	POB	Chris Adams	1/26/2010	2/26/2010	1/26/2010 - Chris and Scott met with CFO. Will be completing signed deal form as soon as the deal. Contact in one month to see if we can schedule meeting to walk through our audit process and help in 2009.
2/22/2010 6:23 AM	XYZ Inc.	Yes	Pursuit	POB	Scott Jensen	1/15/2010	2/8/2010	1/15/2010 - Scott discussed initial project by phone with CFO.
2/22/2010 8:11 AM	Acadtron	Yes	Client	MND	Michael Lynch	1/11/2010	1/15/2010	Acadtron attended our MSD Symposium. They were identified as a pursuit with various needs. Mike and Jason met with Rick Smith on 10/28/09. Rick expressed interest in various services. Mike and Jason's follow up accordingly. Scott Jensen is to open for Rick Smith. We received copies of file and have requested tax returns. Jason sent Rick an email on 10/25/09 suggesting consideration of possible state corporation. Rick responded on 11/14/09 indicating he would get the tax returns to us. Also, Scott will likely be in our office in December. We will coordinate a meeting. The tax meeting with Scott did not work out. Mike needed Rick to the 1/22/10 Chamber Forum. Mike and Jason plan to have a follow up meeting by 1/15/10. We may also try to get Scott down here for a meeting by 2/2/10. Jason and Rick met with Rick Smith on 1/15/10. The outcome of the meeting was the tax work, a completed flowchart and observations for future audits.

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## Pursuit Plan

- A pursuit plan helps plan how to win a pursuit or value-added service opportunity with an existing client
- Develop information
- Understand dependencies
- Plan and execute substantive and meaningful actions based on your knowledge of the pursuit or client





Questions?

Merci!  
Thank you!