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Sales Process and Training Overview

The sales industry is important for many reasons, not the least of which is the fact that a company's entire revenue stream is essentially driven by its sales force. Basically whatever funds an organization has available have been created by selling their goods or services to others. But before understanding what sales does for an organization and what the sales process does for the bottom line, it is important to first know what exactly sales is and what it does for an organization.

"Sales" is essentially the process of assisting, convincing, or persuading a person or organization to pay money for something else; and there are many types of sales, but they can be roughly organized into four categories: person to person sales, person to business sales, business to business sales, and business to person sales. Each category is different from the others, but all employ similar tactics and processes.

Sales is also extremely relevant for Cal Poly students, for multiple reasons. It is specifically relevant to communication studies majors for one, because communication is the driving force behind all sales. A person cannot convey ideas or persuade others without communicating, and COMS majors receive training that is aimed at helping them to do just that. On a more general level, sales is a relevant field for all graduating (or near graduating) students because of its relevance to so many different areas of study, and it is also a great way for students to enter the work world when they are not entirely sure how they want to spend the rest of their work lives. For this reason, Cal Poly created the Business 464 course: The Sales Development Program.

Origins of the Sales Development Program

Cal Poly's Sales Development Program, or SDP, was originally started by Professor Lisa Simon as a way for students to have a sales-specific learning opportunity. At the time, the College of Business offered a marketing concentration, but no courses that directly focused on selling. In the College of Liberal Arts, Communication Studies majors are able to take courses in rhetoric and persuasion, but nothing that directly relates to the process of sales. Because of this lack of sales training, Professor Simon began to hold sales Workshops designed to give students—and others who were interested—a chance to learn and practice the sales process. The workshops were held on weekends and began to draw enough interest from attendees that they were eventually converted into a senior project, which is the Sales Development Program that still exists.

Purpose of the Sales Development Program

The Sales Development Program is an 11-week program designed to give students the tools and knowledge needed to be the best salespeople they possibly can, in a short amount of time. The course is driven by a set of learning objectives and is a great opportunity for students to get a feel for what the sales process is like in “the real world.”

The learning objectives were closely followed, and require students to:

- Know the steps in the selling process
- Know specific facts about a product or service as they relate to solving customer needs
- Formulate a selling plan for a specific customer situation
- Formulate questions for the customer that uncover needs

- Create a solution to solve a customer's problem
- Plan an oral presentation to a customer
- Demonstrate effective oral presentation skills
- Demonstrate effective listening skills
- Demonstrate effective negotiating skills when the customer objects
- Judge own and others' sales presentations
- Construct charts, graphs, and other selling tools to convey important product information
- Perform selling process in a competitive environment
- Appreciate the opportunities available in the selling profession

The ultimate purpose of the SDP is to make students better salespeople, and really show them the ins and outs of the sales field. In my experience with the Sales Development Program, students became well acquainted with each learning objective by the time the course was finished, and benefited greatly because of them.

Coursework Relevance

Although the Sales Development Program is technically run by the Orfalea College of Business, it teaches ideas and principles that are highly relevant in multiple COMS courses, as communication is such a huge part of sales.

Selling is largely about the process of interpersonal communication, and right off the bat, it was apparent that the selling process directly relates to many principles taught in COMS 212, "Interpersonal Communication." The course is all about daily interactions

between people in a one-on-one setting, and how to most effectively navigate these situations. While arguably the entire course is applicable to the sales process taught in the Sales Development Program, a few stuck out more than others.

1. **Verbal Communication-** A large portion of the selling process is actually selecting the language that will be spoken to the prospect. Using the right words at the right time is key to a successful sale.
2. **Nonverbal Communication:** The gestures, movements, and inflections we use in our everyday communication play just as big of a role as our actual words, and go a long way toward the prospect believing what the seller has to say.
3. **Communication Competence:** Having the ability to communicate with various parties by adapting communication styles is hugely important in sales. Whether you are speaking with a secretary or CEO of a huge company, you must be able to adapt and speak in a way that your audience will both appreciate and relate to.
4. **Empathy:** Being able to see the presentation from the prospect's point of view is vital to implementing and believing in the "consultative" model of selling, as opposed to the "used-car salesman" approach.
5. **Linear communication model-** Salespeople are often viewed as big talkers, and this idea must be avoided in order to have a successful relationship with the prospect. No one likes to be talked at, and arguably the most important skill to have as a salesperson is the ability implement the linear communication model, which is essentially a "two way street" of communication, and ensures that the seller will do a lot of listening, and not just talk.

6. **Prompting:** In order to avoid following the linear communication model, it is very useful to use prompting (using silence as a way to encourage the audience to speak) as a method of getting the prospect to speak and share their thoughts.
7. **Questioning:** This method of listening is at the heart of needs identification. It is vital to listen closely to what the prospect says, and then follow up with questions that allow the seller to clarify and hone in on the true needs.
8. **Self-Monitoring:** It is very important for the seller to be aware of how they look and sound while presenting their product or services. This is where the role plays and feedback come in handy.

While there are countless other concepts and ideas taught in the COMS 212 course that are relevant to the selling process and how sales works, the eight listed above are a very solid core that can be used to see how relevant the selling is to one of the most fundamental and important courses the Communication Studies department has to offer.

Continuing in course number order, another highly relevant course is COMS 213, or Organizational Communication. The course focuses largely on communication that takes place within organizations or within the workplace, and how to successfully traverse the terrain that is the workplace. Similar to COMS 212, Organizational Communication is ripe with ideas and lessons that are applicable in the selling process. Here is a list of some of the most relevant ones:

1. **Managing Up-** Managing up entails doing things before they are asked of you, and going above and beyond what is “expected” of you. This concept is generally applied to moving up within an organization, but can also be used in a sales setting to help push a prospect to become a buyer. While the prospect may have

general expectations of how you will behave and interact with them as a salesperson, being extra cordial and helpful can go a long way. Providing the prospect with competitor comparisons when they ask, or helping to make sure offer them the best price they can get are both great ways to create rapport with the prospect and increase their likelihood of buying.

2. **Principles for Peons-** There are seven steps in the “Principles for Peons” designed to help employees traverse the work world and are highly relevant to selling as well. Here are the four most relevant:
 - a. **CYA-** “Cover Your Ass.” CYA is the idea that a person should never do anything in the workplace that could really get them in trouble, and if for whatever reason you *do* get in trouble, you need to have a great explanation. One of the biggest rules in the selling process is to never give answers to questions you don’t know for sure. This is essentially CYA at its finest; if you don’t want to get in trouble for giving false information, say you don’t know.
 - b. **Principle of Decision Making-** “Never decide something today if it can wait until tomorrow. Be informed!” This applies to all decision making processes, and your prospect will be following the exact same path. It is your job as a seller to create urgency and make their needs visible, to show the prospect that their decision cannot wait until tomorrow.
 - c. **Principle of Modesty-** “Never appear better than your boss.” This applies to all work situations, and in this scenario, your boss is your

prospect. Never do anything to show them up or make them feel stupid or unworthy of your time.

- d. **Principle of Self-Importance-** “You’re expendable.” This is just a reminder that no matter how great you are as a salesperson, there is always someone else who is doing a similar job. Take your prospect for granted, or fail to treat them with respect, and that person will be doing your job.

3. **“We” and “You” Language:** Telling someone “You” have this problem, and “You” need to fix it comes off as very accusatory and puts them on the defensive. On the other hand, telling them “We” can come up with a solution to “Our” problem is much more likely to prevent them from becoming hostile. Using these message types at the right times will cause a prospect to feel like their needs and problems are an issue that they need to resolve, but the solution is a group effort.

The concepts taught in Organizational Communication lay the groundwork for students to continue to be successful once they leave the educational environment and enter the workplace, and are applicable to virtually all fields of work. The concepts listed above, however, are especially relevant when it comes to the selling process, and are helpful for any salesperson to keep in mind while interacting with prospects.

Although the selling process is generally a one-on-one relationship, there are times when groups are necessary to complete the task at hand. This can be to prepare and practice for an upcoming sales call, doing research and gathering info about the product, or actually making a sales pitch to the prospect. Whatever the scenario may be, there are

bound to be times when group work is necessary, and in times like these, ideas taught in COMS 217, Small Group Communication, are highly relevant.

1. **Groupthink:** When reviewing role plays and providing feedback, it is vital that group members think critically and give constructive criticism as opposed to being “yes men.”
2. **Synergy:** While it would be beneficial to have good group cohesiveness between prospect and seller, it is also very important to have this dynamic between sales coaches and trainees. It is difficult to take criticism and suggestions from group mates who don't necessarily get along with you.

Although there is a huge amount of training, preparation, and group work that goes into sales, a lot of success simply boils down to being able to get the prospect to see things from your point of view, or getting them to do things how you want them to. Generally this process is referred to as persuasion, and in Cal Poly's course on persuasion, COMS 322, students are taught all about the different methods and tactics that can be used in attempts to persuade others to change their behaviors. Here are a few of the more relevant concepts and principles from the course:

1. **Credibility:** This is a huge part of selling, in that if the seller seems like they don't know what they are talking about, or is making things up, the prospect will lose trust and be unlikely to give their business to the seller.
2. **Principle of Social Proof:** If you can show the prospect that other people have bought your services before, they will be more likely to buy. Using references and testimonials is huge.

3. **Principle of Commitment and Consistency:** Getting the prospect to confirm a need or problem they are encountering is a great way to get them committed to implementing a solution later on.
4. **Principle of Liking:** A big part of sales is getting the prospect to like you, and this is exemplified by the principle of liking. People prefer to say “yes” to things they like, or are familiar with.
5. **Principle of Authority:** This concept is similar to social proof, but more specific. If you can show that the CEO of a big company, or someone else who is powerful, supports your product or service, this will seriously aid in the persuasion process.
6. **Principle of Scarcity:** People are more likely to purchase something if they think the time they have to do so is limited. By using words like “today,” and “right now,” prospects will be more likely to have impulses to buy.

Having the ability to persuade others is arguably the most important and relevant skill set a salesperson can have. While there are countless hours of work and preparation that go largely unnoticed by most, all of that is for naught if the seller is unable to put them into practice and convince the prospect to actually purchase something. Knowing what makes people tick and what influences them in their decisions can go a long way toward being successful in persuading them.

There are also many concepts that can be taken from COMS 413, Advanced Organizational Communication, that can be applied to the Sales Development Program; both in the actual sales call and while working with managers to develop a more effective sales pitch. Some of the most relevant are as follows:

- 1. Affinity Seeking:** Although selling ability and product knowledge are very important in the sales process, it is also very helpful for the prospect to like you.
- 2. Parroting:** An effective method of performing needs identification is by repeating back to the prospect exactly what it is they said to you. This is often effective in getting people to realize they have already admitted needs to you.
- 3. Paraphrasing:** Aside from directly quoting something a prospect has said, it is also effective to repeat what they have said in very similar words.
- 4. Visual, Auditory, Kinesthetic Learning Styles:** A sales pitch can vary greatly depending on the learning style of the prospect. It is very important to match your presentation style with the prospect's learning style, so as to not waste time with the wrong method.

In teaching the previously mentioned concepts and ideas, there are many different methods used to help make sure students fully understand the ideas they are being taught. The most common, and arguably most important, is the use of sales role plays, in which students run through the entire sales process from beginning to end with another person in order to perfect their sales pitch. The role play process is broken down into seven different areas, each with sub-sections that allow for easy analysis, feedback, and grading of a student's role play.

Selling Process

The first section in the sales process is “The Approach.” This is essentially the introduction of the salesperson and the prospect, and is a great chance for each person to get to know one another. There are four sub-sections in “The Approach,” and they are as follows:

- Professional Introduction- Seller introduces himself to the prospect with a firm handshake, says his/her first and last name, and offers a business card for future communication.
- Gain prospect’s attention- Here, the seller makes sure the prospect knows why (s)he is there, and also that the prospect is focused on the presentation at hand, and not distracted by anything else around them.
- Effectively build rapport- This is a time for the seller to ask questions about the prospect, both to gain background knowledge, but also to allow the prospect to become comfortable with the seller, and ease any tensions that may initially exist.
- Smooth Transition into needs identification- Seller eases into the business of the meeting without being too abrupt or obvious.

After “The Approach,” the seller transitions into the process of “Needs Identification.” This sets the foundation for the entire selling process, and often determines whether or not a sale is successful or not. The basic idea driving the Needs Identification process is to uncover all areas where the prospect is lacking in a way that

the seller can help improve. The “Needs Identification” process consists of five sub-sections:

- Uncover decision process- This ensures the seller is talking to the person who will actually make a decision in regards to the presentation, and that—if the prospect decides to implement the product or service—there is a process in place to ensure it happens. It also helps to prevent the seller from making the same presentation multiple times and allows him/her to be more efficient.
- Effectively determine relevant facts about the company and buyer- The seller should already know as much as (s)he can about the prospect and the company, but this is a chance to collect more info about specific areas in the business where the seller can help improve things.
- Effectively uncovered needs of the buyer- Seller asks questions about how business runs for the prospect, and determines areas where they are unhappy or inefficient. The seller then confirms that the prospect views these as actual needs, and that they are urgent/important.
- Bring buyer’s attention to the consequences of not taking action- Make sure the prospect understands that their frustrations/inefficiencies will continue, and potentially grow if nothing changes or if a solution is not implemented.
- Gained pre-commitment from buyer to consider the product/service- After addressing the prospect’s needs and wants, the seller should present the questions of whether or not the prospect will be willing to entertain the idea of

implementing the seller's solution, assuming the solution seems like a good fit for the prospect and the issues they are currently dealing with.

After identifying and confirming multiple needs with the prospect, it is then time to transition into the actual presentation of the product. The seller should have two or three serious and important needs or problems that the seller has helped uncover, and the seller now needs to spend time addressing these needs and determining whether or not they address the issues that were previously brought up.

- Present benefits of product/service instead of features- While all products have features that sound great to the people selling them, the prospects are not interested in the features at all. What a prospect is interested in is whether or not the product/service they could be investing in will actually BENEFIT them. Benefits are easily more important to the prospect than the “features it may or may not have.”
- Logical, convincing presentation- While “product knowledge is power,” and understanding the needs of your prospect is very important, if your presentation has no rhyme or reason, and is difficult or impossible to understand, even the most qualified prospect will not be interested in giving their business.
- Use appropriate visual aids- Knowing and conveying selling ability is not always enough to truly persuade someone. Depending on how the person learns or absorbs information, various visual aids (graphs, charts, logos, etc.) will go a long way toward pushing a prospect to become a customer.

- Effectively demonstrated the product/service- An overall analysis of the presentation should show that it was coherent and persuasive in showing the prospect why the seller's product is worthwhile and valuable.
- Effectively involve the buyer in the demonstration- The seller needs to include the prospect in a multitude of ways. The first of which is asking—and waiting for responses to—questions to the seller. This means not lecturing or running through a “scripted” monologue with virtually no prospect/seller interaction. Involving the prospect also includes allowing them to participate in the presentation, whether that means holding visual aids and handouts, or using the mouse and keyboard to navigate a website or webinar. A seller is more likely to implement something they already feel like they are a part of.
- Effective use of trial closes- While presenting and interacting with the prospect, the seller also needs to be continuously qualify the prospect and determine whether or not the presentation is effective and whether or not they are being receptive to the ideas brought forth to them. This can be determined by analyzing nonverbal cues like body language, or just simply asking the prospect if it seems to them that the product will solve the problem(s) that had previously been discussed.

No matter how effective a sales presentation is, a prospect will rarely just agree to implement the seller's solution without putting up resistance. A good salesperson must be prepared to answer all objections and do their best to turn initial concerns into net positives for the prospect.

- Initially gain a better understanding of the objection- When an objection is initially brought up, it is best to ask the prospect what they mean, so as to best understand what exactly they mean. Answering an objection that doesn't actually exist wastes the prospect's time and makes the seller look bad.
- Effectively answer the objection- After gaining a good understanding of what the prospect is actually concerned about, the seller needs to answer and overcome the objection. Generally, objection responses can be thought of ahead of time, but some may need to be created on the spot.
- Confirm objection is no longer a concern for the buyer- After confirming and addressing the issue the prospect initially brought up, it is best to circle back and make sure the response the seller provided has actually done its job. This allows the seller another opportunity to handle the objection if they are initially unsuccessfully, but—if the objection is addressed—the confirmation process also causes the prospect to realize what was once a big issue in the buying process is no longer a roadblock for them.

After addressing and neutralizing all concerns and objections the prospect may have, the seller must now close the selling process. This can take place in many ways, but the seller must be aggressive and be aware of what the prospect's sentiments are before the actual close takes place. This is why trial-closes and pre-closes are so important and must take place throughout the entire selling process.

- Persuasive in presenting a reason to buy- The seller must create an impulse at some point in the sales call for the prospect to actually buy. This is the ultimate goal of the presentation, and should be fairly clear as to whether or not the salesperson was effective in completing this goal.
- Asks for the business- The seller must be clear and direct in their intentions, making it clear that they would like the prospect's business, and truly value their time and money. It cannot be left up to the prospect to offer their business, it must be asked for.

Now that the selling process has been completed, it is useful to go back and analyze how the seller went about communicating in the sales call—the words and phrases they used, the gestures and inflections that accompanied those words, and how they all fit together in the overall scheme of things.

- Effective verbal communication skills and verbiage- It is vital that the seller uses appropriate word choice throughout the entire presentation; the words must make sense and fit together in a coherent way. The salesperson needs to get across as much information as possible in a very short amount of time, all while maintaining the prospect's interest. This means they have to be clear and understood, and must choose appropriate words for the situation/prospect.
- Appropriate nonverbal communication- The seller must have non-verbals that match with the situation as well. The non-verbals the seller uses (gestures,

posture, inflections, etc.) must match up with the words being used and get the prospect excited, but not be overly aggressive at the same time.

After analyzing the communication processes in the sales call, the overall effectiveness of it must be looked at. Basically, what is measured in this portion are the intangibles, or the overall feel of the sales call.

- Salesperson enthusiasm and confidence- A large factor of whether or not someone will buy from you is whether or not you seem like you know what you're talking about, and whether or not you believe in the product you're pushing. If the seller seems sure of the things they're telling the prospect, and also seems convinced that what they are selling will help the prospect, the prospect will tend to believe these things as well.
- Product knowledge- Although "seeming like" you know what you are talking about can be very helpful in persuading a potential prospect, "actually knowing" what you are talking about and what your service actually provides can also go a long way toward success. It is much easier to seem like you know what you are doing during a sales call if you actually do know what you are doing.

Sales Portfolio

While role-playing is a great way for sales trainees to become comfortable and familiar with the sales process, and is generally the backbone of all sales training programs, another hugely important piece in the sales preparation puzzle is the Sales Portfolio. In essence, the sales portfolio is the sales person's arsenal of weapons. It contains everything from visual aids, to pricing, to referrals and testimonials, and is also a great reference for the seller during any sales call. All sales portfolios can and will be slightly different, in the order things are contained, in the depth that each section goes into, and sometimes even the topics that the portfolio encompasses. However, each sales portfolio should contain the following, to an extent:

- Client Background Information- While this section would generally not be shared with the prospect, it is extremely beneficial to have extra information about the prospect or their company before the sales call begins. While all research and homework should be done ahead of time, sometimes it is helpful to quickly check your facts, or confirm a few numbers about the prospect that you may be unsure on. Having a "cheat sheet" about the client allows the seller to accomplish this quickly and easily.
- Features of the product/service- This is a basic list of what the product "has" and what it can do. These are not always of the most urgent interest to the prospect, but are generally a good way to ease into discussions about the product and how the prospect could potentially implement it.
- Benefits- These are what is truly relevant to the prospect, as it shows them not just what *your* product can do, but how it can help *them* specifically. This is

where they will learn how they will save time, money and hassle, and increase revenue and profits by purchasing from you. The benefits are arguably the most important portion of both the sales portfolio and the sales process as a whole.

- Pricing- It is important to have pricing included in your sales portfolio if for no other reason than it makes people comfortable to see price quotes in writing. Seeing a price in writing makes it seem permanent, and unlikely to change, meaning the prospect will not have to worry about you misquoting them or trying to raise the cost of their investment.
- Visuals- Similar to pricing, people don't like to just hear about things, they like to see them. Having visuals in your portfolio both makes your words seem more real and permanent, but also stimulates an entirely different part of the brain than just speaking to a prospect does, and may end up being infinitely more effective with certain prospects.
- Testimonials- Tying in to the principle of social proof discussed above, people like to know that they are not the only person on earth who is listening to you. Showing them quotes and words of praise from other clients—specifically successful, high-profile clients—will make prospects much more comfortable, and ultimately much more willing to buy.
- Note Pad- While it may seem simple, there is not much worse than having all kinds of details and specific information to keep track of, and having nowhere to put it. Having a note pad with your portfolio is important because not only does it allow you to take notes and reference them throughout the entire sales call, it shows the prospect that you are listening and interested in what they have to say.

The sales portfolio will change and evolve, and grow and shrink as time passes and as the salesperson adapts, but it will almost always be the most effective tool for presenting a compelling argument for a prospect. There will be times when other tools are used to complement and assist the sales portfolio, but when all is said and done, the portfolio is the most essential tool while selling.

Sales Plan

Aside from the sales portfolio, another tool that all effective salespeople should utilize is the sales plan. The sales plan is essentially an overview of everything related to the sales process, starting with the prospect. Before a salesperson can be prepared to sell to a prospect or buyer, however, they have to get to know them. The sales plan lays out a solid groundwork of what is or what should be known about the prospect. (Appendix B)

The first—and maybe most basic—item is the historical perspective of the prospect. When were they founded? Why were they founded? Who founded them? Who is in charge now? After getting some background information on the company, it is important to know what they are doing now, by getting information on their current happenings. What do they do? What services or products do they provide? How do they provide these services? Who are their clients or customers? Do they work with individuals or companies? How many of their products do they sell? What do they cost? How many offices do they have? Are they a national corporation, or a smaller, family-run business?

After answering questions about the current state of the company, you should move on to more general information about the organization. What is their company

image like? Do they have a specific market in mind? What are the company values? What is their mission statement? After getting a good feel for the company culture and the direction they seem to be headed, you can be better prepared to both show them how your services will help them continue in the direction they want to go, as well as make the task of selling to them much easier.

The second step in preparing the sales plan is to have as much information about your services and the company that provides those services. All the information the seller knows about their prospect they should know about themselves, and be prepared to relay this information to the prospect when they are trying to gauge whether or not there is a good fit.

Once the basics of the company are covered, it is important to have product knowledge as well. The seller should have in-depth knowledge of every aspect of the product they are selling, and be able to quickly share this information with their prospect. The seller should also have the features and benefits included in this section of the sales plan, so they are able to show the prospect what exactly it is that their product can do, and how exactly it will make the prospect's current situation better.

The salesperson then needs to cover the pricing structure of their product, which means that they need to understand and be prepared to answer questions about any aspect of pricing that the prospect may present to them. The seller needs to be familiar with the pricing structure and model of their services, whether they have one up front fee, a monthly payment plan, or anything in-between. After covering the pricing basics in the sales plan, smaller details of pricing must then be included. Any add-ons or upgrades that could possibly be included need to be accounted for, and the seller needs to be

prepared to present any and all of these minor details to the prospect with complete confidence and knowledge that they are giving accurate information.

Once all company and product information is covered and documented in the sales plan, it is then time to prepare for the selling process itself, and the foundation of that selling process is in the needs identification stage. There are many ways to seek out and identify the potential needs of a prospect, and one of the most effective methods of doing so is referred to as the “X-Ray Technique.” The X-Ray Technique is a popular type of needs identification that makes use of “Issue Questions,” “Impact Questions,” and “Improvement Questions (Simon 2012).” The purpose of asking these types of questions in this order is to do three things essentially:

1. Determine what the prospect’s “issues” are.
2. Determine what kind of “impact” these issues have on the prospect.
3. Determine what would happen to business if “improvements” were made to the current “issues.”

When these types of questions are used together, they are extremely effective, not just at allowing the salesperson to answer questions about the problems the prospect may be currently facing, but also helping the prospect to truly realize what exactly it is they are dealing with, and some potential solutions to their problems.

When dealing with issue questions, it is best that the questions asked of the prospect be as broad as possible, for multiple reasons. For starters, it is very difficult to know exactly what is troubling the prospect, and what they are struggling with if you haven’t talked to them for too long. Asking specific questions right off the bat is a good way to get negative and undesirable answers from the get go. Another big reason for

asking broad needs-identification questions at the start is that they allow the prospect to give you more information. A good example of a broad issue question is “What issues are currently keeping you up at night?” or “What specific business problems are you hoping to solve?” While it may seem like a prospect would be unwilling to share this type of information so soon, they also don’t want to waste their time beating around the bush, and will more often than not give one or two solid answers for the sales person to continue their digging.

After getting answers to the issue questions, the seller now needs to be ready to ask good impact questions. While these should still be somewhat broad, they can be slightly more on topic and specific than the issue questions, mainly because they are in response to specific answers the prospect has already given. The main purpose of a good impact question is to get the prospect to feel the damage their problems are causing, both to their business and to themselves, and a prime example of a good impact question is “Can you tell me how this is affecting you as a person?” or “How does this affect productivity?” What these impact questions do is get the prospect to realize that not only is their issue real, but it is an issue that comes with very real and significant consequences.

Lastly, after both the issue and impact questions, come the improvement questions. These questions are meant to get the prospect to understand how much better their situation would be if one or two of their “issues” were different, and—ideally—that the seller can help make those improvements. Two examples of great improvement questions are, “If this issue were resolved, what would that do for you?” and “What would you be able to do with the time you’re focusing on the issue?” Once the prospect

has gone through all three of the steps in the X-Ray process, they should be prepared to check out what the seller's services can do for them.

The final, yet still incredibly important part of the sales plan, is to prepare for objections that will be thrown at the salesperson. While some may believe good salespeople just improvise everything and "hope for the best" while dealing with prospects, the best sellers are those who actually have all of their responses planned out and memorized before even sitting down with a potential client. A big advantage that salespeople have is that they will likely get the same objections over and over again, and can therefore be prepared to answer and overturn any of these objections, just by anticipating them. Some common, and easy to overturn objections can be:

- I can't afford your product.
- I don't have time to purchase something like your product.
- This isn't a good time to talk.
- Send me something in the mail.

The list can go on and on, but the main issue is that the seller be prepared to deal with these objections ahead of time, and ultimately turn them into positives.

Sales Competition

The ultimate goal of the Sales Development Program is to determine who the most effective seller in the course is, and have them represent Cal Poly in the National Collegiate Sales Competition, where schools from all over the country put their selling skills on display. The most effective seller in the course is determined by holding a

similar sales competition at Cal Poly, one that follows the same rules and guidelines, but is just smaller than the NCSC. (Appendix A)

Corporate sponsors are brought in to act as prospects, and each student from the SDP has 10 minutes to run through the entire sales process, from The Approach and Needs Identification all the way to the close. Sponsors act as they would on a traditional sales call, and provide needs and make objections accordingly. Students are graded by judges (other corporate sponsors, etc.) and the student who the judges have determined is the most effective at presenting their ideas and overcoming objections is the winner of the local sales competition. They are then eligible for an all-expenses paid trip to Atlanta for the National Collegiate Sales Competition, which features the top collegiate sales programs around the nation.

Sales Ride-Along

During the training and preparation process, it is also highly encouraged for students to participate in a sales ride along. This is essentially an opportunity for these sales-people-to-be to get a chance to see what it is like for someone currently in a sales position to go through their daily routine and interact with real prospects, as opposed to a role play partner. Along with the role play process, the sales ride along really embodies Cal Poly's "Learn By Doing" motto, by having students accompany a salesperson who is doing the very thing they are learning about and trying to emulate.

Analysis of Personal Experience and Conclusion

Overall, my experience with Cal Poly's Sales Development Program was nothing short of phenomenal. The people and experiences I was fortunate enough to encounter during my time spent in the program truly helped me grow and adapt, not only as a sales person, but also as a student and an individual. Having the opportunity to travel to Atlanta and compete for my university against dozens of the top collegiate sellers in the nation is one of the highest honors I have received, and I wouldn't trade it for the world.

Not only do I feel that the time spent practicing and preparing in Cal Poly's Sales Development Program has made me better at sales, but it has also given me a better understanding and appreciation of the field that I've planned to enter for years now. I always knew that sales required hard work, but the SDP deepened this belief. While I was previously under the impression that great salespeople could get by with a little research and a lot of charisma, participation in the SDP and the NCSC quickly challenged this notion. Soon after beginning the course I realized how much work and preparation goes into just a 15 or 20 minute sales call, and now have a much better understanding of what it really means for someone to call themselves "a salesperson," which is an invaluable lesson. Cal Poly's Sales Development Program has been one of the biggest highlights of my college career, and I would not be in the position I am today had I not elected to participate in the program. It is an extremely functional, relevant, and challenging program that helps students create and foster their selling abilities, and ultimately become more confident in themselves. I would strongly recommend the Sales Development Program to anyone who is even remotely considering sales as a career option.

Reference

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**Appendix A
Sales Process Evaluation Sheet**

**National Collegiate Sales Competition
Contestant Evaluation Sheet**

Salesperson #: _____ Judge #: _____ Score: _____

Score each item on a 0 to 10 scale with 10 being the best possible score and 0 the absence of the skill or behavior being evaluated.

5% Approach (Effectively gains attention and builds rapport)

- _____ Professional introduction
- _____ Gains prospect's attention
- _____ Effectively builds rapport
- _____ Smooth transition into needs identification

25% Needs Identification (Obtain a clear understanding of customer's situation in order to prepare a customized presentation)

- _____ Uncovered decision process (decision criteria, budget, people involved in the decision)
- _____ Effectively determined relevant facts about the company and buyer
- _____ Effectively uncovered needs of the buyer
- _____ Asked effective questions that brought to the buyers' attention what happens to company or the buyer when problems continue (helped convert implied needs to explicit needs)
- _____ Gained pre-commitment to consider the product/service

25% Presentation (Persuasively match product's benefits to buyer's needs)

- _____ Presented benefits of product/service instead of features
- _____ Logical, convincing presentation (display a strategy to communicate and persuade; clearly understands needs "hot buttons" of prospect and concentrates on those needs)
- _____ Used appropriate visual aids
- _____ Effectively demonstrated the product/service
- _____ Effectively involved the buyer in the demonstration
- _____ Effective use of trial closes (follow-up questions to determine where buyer is in decision process)

15% Overcoming Objections (Eliminate concerns or questions to prospect's satisfaction)

- _____ Initially gains better understanding of objection (clarifies or allows buyer to clarify the objection)
- _____ Effectively answered the objection
- _____ Confirms objection is no longer a concern for the buyer

10% Close (Take initiative to understand where you stand with buyer now and for the future)

- _____ Persuasive in presenting a reason to buy
- _____ Asks for the business

15% Communication Skills

- _____ Effective verbal communication skills (active listening; restated, rephrased, clarified, probed for better understanding)
- _____ Appropriate nonverbal communication
- _____ Verbiage (clear, concise, professional)

5% Overall

- _____ Salesperson enthusiasm and confidence
- _____ Product knowledge

Comments: _____

Appendix B Sales Plan

Sales Plan

1. **Buyer Profile-** General information about the buyer.
 - a. **Historical Perspective-** ROSI was founded 25 years ago (about 1987) in New Orleans by Barbara and Barry Boudreaux. Barbara and Barry came together using Barbara's knowledge of the restaurant industry, and Barry's understanding of oil-related engineering.
 - b. **Sales Volume-** Not entirely sure on numbers, but currently experiencing a nationwide slump, specifically in the North East. Considering expanding into other restaurant-related products to help business.
 - c. **Office Numbers/Locations-** ROSI has offices nationwide, originating in New Orleans. Strong presence on west coast and eastern US, lacking offices in Midwest.
 - d. **Company Image-** ROSI looks out for both the customer and the environment with their products. ROSI helps clients both financially and with safety. Also, by recycling oil, they help the client get the most out of their purchase, and also help save the environment.
 - e. **Products/Services-** ROSI does not charge for the actual equipment, because it is company owned-and maintained. They do charge for the delivery and installation. Cuts down on oil consumption, saves on spill clean-up costs, and worker's comp. Also cuts down on waste-management costs.
2. **NetSuite Profile-** General information about NetSuite as a company
 - a. **Historical Perspective-** Founded in 1998 by Larry Ellison (Oracle) and Evan Goldberg. Goldberg had the knowledge/experience, Ellison had the money. IPO in 2007 and rose over 30% in the first day of trading.
 - b. **Sales Volume-** \$193 Million in revenue in 2010. Over 10,000 clients worldwide. Increased from \$17.7 Million in 2004.
 - c. **Number of Offices-** 11 Offices Worldwide: East Coast, West Coast (Headquarters in San Mateo), Canada, Japan, Czech Republic, Australia, China, and the UK.
 - d. **Company Image-** Industry leader in providing SaaS ERP and CRM solutions to "high-growth and midsize" companies.
 - e. **Products/Services-** SaaS Management Solutions
 - i. **NetSuite-** Web-Based Accounting, ERP, CRM, Inventory and E-Commerce Software
 1. **ERP-**
 - a. Financial Management
 - b. Human Capital Management

- c. Order and Billing Management
 - 2. **CRM+-**
 - a. Sales Force Automation
 - b. Customer Service Management
 - c. Marketing Automation
 - 3. **E-Commerce**
 - a. Website Hosting/Content Management
 - b. Web Marketing
 - c. Business-to-Business E-Commerce
- f. **Purchase Policy/Procedures-**
 - i. NetSuite is implemented via the Internet, so no “physical” installation or cash purchase is needed. Clients can purchase online, by telephone, email, etc. The beauty of being web-based is that transactions can take place anywhere with an Internet connection.
- 3. **Description of the Product-** General information regarding NetSuite
 - a. **Features, Advantages, and Benefits-**

- **ERP-**
 - Financial Management
 - **Features-**
 - Financial Accounting
 - Financial Dashboards, Reports and Analytics
 - Payment management
 - **Benefits-**
 - Improve business performance with real-time metrics and role-based dashboards
 - Shorten days sales outstanding (DSO) with automated billing and collections management
 - Accelerate financial close and improve revenue recognition processes
 - Ensure accountability and compliance with comprehensive, auditable accounting
 - Streamline order-to-cash and procure-to-pay business processes
 - Eliminate errors and streamline processes with seamless integration between financials, and CRM and Ecommerce
 - Customize and extend the software to meet your exact needs.
 - Human Capital Management
 - **Features**
 - Employee Resource management
 - Payroll Management

- Incentive Compensation Management
 - **Benefits**
 - Get complete human resource management capabilities that streamline on-boarding and day-to-day activities and reduce manual processes
 - Improve employee and management satisfaction and retention with complete self-service functionality and managerial approval workflows that allow employees to perform and track many transactions themselves
 - Reduce payroll administrative overhead and the risk of errors with NetSuite's complete payroll management capabilities
 - Motivate your sales teams by aligning their performance with powerful incentive management.
- Order and Billing Management
 - **Features-**
 - Quote and Order Management
 - Streamlined Order Fulfillment
 - Billing Management and Invoicing
 - **Benefits-**
 - Accelerate cash flow with an integrated quote-to-order-to-cash process across sales and finance
 - Drive sales by taking control of the quote and order process with integrated approvals, discounting policies, pricing and more
 - Monitor orders and reduce days sales outstanding (DSO) with real-time dashboards and detail reports
 - Improve customer satisfaction by providing self-service access to order and delivery information as well as payments
 - Reduce effort with automated creation of invoices based on payment terms and automation of complex billing processes such as recurring, time and project-based billing.
- **CRM+-**
 - Sales Force Automation
 - **Features-**
 - Opportunity Management
 - Customer Management
 - Sales Forecasting
 - **Benefits-**

- Gain real-time and accurate visibility into pipeline and forecasts
 - Boost sales efficiency by effectively collaborating with team selling
 - Monitor sales team performance against quotas based on real-time invoices and cash sales collected by your accounting team
 - Increase the value of your customer relationships with a true 360-degree view of the customer, including all sales interactions, support cases, and financial transactions
 - Accelerate the customer lifecycle from lead to opportunity to order to cash
 - Let sales reps generate their own quotes and book orders, with real-time visibility into back-office data
 - Provide deep insights into activity and business performance through real-time dashboards.
- Customer Service Management-
 - **Features-**
 - Case Management
 - Knowledge Base Software
 - Customer Portal
 - **Benefits-**
 - Track customer satisfaction in real time in order to address problems immediately and enable better customer retention
 - Provide support teams anytime, anywhere access to customer information—ideal for remote support employees
 - Link sales, service and fulfillment organizations to drive more revenue
 - Accelerate case resolution times by providing support reps with complete customer visibility
 - Increase response accuracy and reduce response times with an integrated knowledge base
 - Use case escalation rules to ensure that your most valued customers always receive the proper levels of support

- Stay on top of your support team's performance with real-time case data delivered directly to your NetSuite dashboard.
 - Partner Relationship Management-
 - **Features-**
 - Lead Management
 - Forecasting
 - Campaigns and Promotional Discounts
 - **Benefits-**
 - Expand revenue and new market opportunities by building a dynamic partner channel
 - Provide real-time visibility into day-to-day marketing and sales activities for better tracking and shorter sales cycles
 - Greatly improve your partner relationships by empowering partners to thrive in your channel
 - Control the flow of information and communications through every phase of the partner sales and marketing process
 - Unite your partner activities with your in-company CRM and order management in a single application.
- **Ecommerce**
 - Website Hosting and Content Management
 - **Features-**
 - Website Hosting
 - Online Forms
 - Search Engine Optimization
 - **Benefits-**
 - Produce a professional website cost effectively
 - Easily update the content of your website without any programming skills
 - Grow your website painlessly with powerful database-driven capabilities, and easily manage content across multiple websites
 - Maximize your global reach with support for multiple websites in multiple languages
 - Display sites in different languages

- Keep your business in sync with NetSuite's complete integration between your website, your front office and your back office.
- Web Marketing
 - **Features-**
 - Email Marketing
 - Paid Search Marketing
 - Affiliate Marketing
 - **Benefits-**
 - Drive quality traffic to your website with built-in marketing automation capabilities
 - Convert website traffic to leads and sales with online coupon offers and online registration forms
 - Close abandoned shopping carts with automated, personalized email marketing campaigns to shoppers about abandoned carts
 - Optimize web traffic and marketing investments with real-time, "closed-loop" ROI campaign and promotion tracking and web analytics
 - Understand the lifetime ROI of your campaigns, tracking the lifetime purchase history across all channels of any shopper acquired through a campaign
 - Increase cross-sell and upsell revenue with a universal customer database that provides complete visibility into all past customer transactions and interactions.
- Business-to-Business Commerce
 - **Features-**
 - Webstore and Shopping Cart
 - Custom Pricing, Terms, and Credit Limits
 - Orders and Fulfillment
 - **Benefits-**
 - Scale your entire ecommerce business better by improving efficiencies across your entire organization, from ecommerce and sales to inventory and accounting
 - Win more customers with a full-featured, intuitive, "Amazon.com-like" webstore experience

- Provide custom pricing to customers, including negotiated prices, volume discounts and flexible payment terms
- Expedite order processing and shipping for fast, reliable, accurate fulfillment and improved customer satisfaction
- Serve your customers and partners better by providing them with self-service customer and partner portals
- Giving sales and services reps real-time visibility into all customer interactions
- Support multiple business models easily with the ability to run multi-brand webstores and multiple sales channels—as well as support for multiple languages, currencies and countries
- Optimize your marketing investments with real-time "closed-loop" tracking of marketing campaigns and promotions, and increase sales with automated cross-sell and up-sell recommendations

b. Prices and Ordering Requirements-

NetSuite CRM+ Pricing	Base Package		
Features	Monthly	Annual	Included Units
Each Full User	\$129	\$1,548	1 User
Customer Self-Service Portal	–	–	Included
Partner Relationship Management module	–	–	Included
Technical Support: Silver*	–	–	Included
Expense Reporting + Intranet + Employee SS	–	–	For Full Users
Offline Sales Client	–	–	Included
Mail Merge/E-mail Communications	–	–	30,000 per month
E-mail Marketing Campaigns	–	–	10,000 per month

c. Guarantees-

- i. 99.5% Uptime- In reality, NetSuite offers 99.98% uptime

- ii. "No Penalties Guarantee." NetSuite guarantees that your payroll taxes will be filed and paid accurately and on time, as long as the information you provide is correct and timely and you have sufficient funds in your account—or we will pay the resulting payroll tax penalties.

4. X-Ray Technique

a. Issue Questions-

- i. If you could wave a magic wand, what issues would you have immediately disappear?
- ii. What issues are currently keeping you up at night?
- iii. What specific business problems are you hoping to solve?
- iv. Are there any issues that currently stick out to you that you would like to remedy?
- v. What are some of your biggest stressors right now?
- vi. Is there anything in your business right now that you'd like to improve?

b. Impact Questions-

- i. Can you tell me how this is affecting you as a person?
- ii. How does this affect productivity?
- iii. What are some of the specific impacts on business?
- iv. How much time is being spent addressing this issue?
- v. How are you currently handling this issue?
- vi. Is this issue causing you to spend more time working?

c. Improvement Questions-

- i. If this issue were resolved, what would that do for you?
- ii. How well will the solutions you're currently using address that problem?
- iii. Ideally, what would things look like if this problem was solved?
- iv. What would you be able to do with the time you're focusing on this issue?
- v. How would employees be affected if this issue was taken care of?

d. Plan for Implementation-

- o When using the X-Ray Technique, my plan is to ask broader, less specific issue questions in order to uncover as much as possible. I want to be able to cover as many issue areas in one effort as I can. Uncovering as many issues as soon as possible is probably my best bet when it comes to my initial Needs ID.

- My impact questions are designed to follow up and determine where exactly the “pain” is. Issue questions are great, but they don’t tell me how exactly the client is being affected, and what extra measures they have to take on an everyday basis to deal with this thing.
- The improvement questions check in to make sure the client realizes that this problem will not just fix itself. Unless they implement NetSuite or a similar solution, it will not go away, and they will continue to feel the pain they’re already feeling.

5. Objections/Responses-

- a. We don’t have a budget in place for something like that right now.
 - i. When would be a better time for me to follow up when there is something in place?
- b. You’re too expensive.
 - i. I think that once you understand the full value of what NetSuite can provide you, you’ll understand and appreciate the price we ask for it.
- c. Conversion takes too long.
 - i. We can get you started today, and walk you through every step of the process.
- d. I’m not the decision maker.
 - i. Is there a way we could get the other decision maker in on this meeting?
- e. We already have a system in place.
 - i. NetSuite is a fully integrated system, so we will be able to consolidate your current set up, and save you time and money in the process.
- f. What if I don’t have Internet access?
 - i. Realistically, if you were to not have Internet access, you are probably in a location that you wouldn’t be able to access an installed software anyway.
- g. I don’t like the fact that it’s a recurring cost.
 - i. You actually pay the first year of NetSuite up front, so you can account for all of that right away.
- h. I don’t want my clients’ data on the Internet.
 - 1. We use 128-bit encryption, the same as most major banks and finance companies.
- i. What if your system goes down?
 - i. We currently have a 99.8% uptime, and guarantee 99.5%.
- j. I don’t want anyone to use my log in info to steal my data.
 - i. The chance of this happening is no greater than someone logging in to your online bank account.
- k. This isn’t a good time to talk.
 - i. We had previously set aside this time, and it should only take 10 minutes. If not now, when’s a better time?

- l. We don't need a management software.
 - i. Most people don't realize how much NetSuite can help them until they see what it offers.
- m. We're too small.
 - i. The beauty of NetSuite is that we are designed to help clients actually increase business size and cut down on cost at the same time.
- n. We already have a CRM and ERP system in place.
 - i. NetSuite will allow you to integrate those and save time and money in the process.
- o. I don't want to have to train employees in the system.
 - i. NetSuite will walk you through the process 100% of the way.
- p. Your company is too small.
 - i. We actually have over 1000 employees and have offices all over the globe.
- q. You're too large.
 - i. The fact that we are global corporation allows us to have the experience and power to help you effectively run your business.
- r. I've never heard of you before.
 - i. NetSuite was founded by Larry Ellison, owner of Oracle, one of the largest companies in the world.
- s. I wasn't happy with NetSuite in the past.
 - i. We are constantly changing and updating (for free) so your experience now is bound to be different than it was in the past.
- t. How do I know you'll be in business 2 years from now?
 - i. NetSuite has already been around for over a decade, and we're the leader in business management solutions. We're not going anywhere.
- u. We might not be in business 2 years from now.
 - i. NetSuite is designed to both increase revenue and cut down on admin time. By using us, you will make your business too efficient not to be around in 2 years.
- v. You don't have _____ feature.
 - i. NetSuite is constantly updating and changing, so the chances that we do have that feature in the near future are very good.
- w. Send me a brochure.
 - i. Let's be honest, when I get those things in the mail, I just chuck 'em. Are you going to actually take the time to look at it? Or can I just use the 10 minutes we have set aside here to run through our solution?
- x. NetSuite is too complex.
 - i. It is completely customizable to your needs, and we have 24/7 customer service to assist you.

- y. I'm already locked into a contract.
 - i. When does your contract expire?
- z. NetSuite will create job loss in my company.
 - i. While NetSuite will absolutely make your company more efficient and effective, that does not necessarily mean it will do so at the expense of others' jobs.
- aa. What about converting all my current data?
 - i. NetSuite will assist you in converting all of your current data every step of the way.
- bb. I don't see the return on investment.
 - i. What features have I discussed with you so far that don't seem like they provide much value?
- cc. I don't want to risk taking a chance on this.
 - i. No worries, how about checking out a free 30-day trial and I'll check in at the end of the month.
- dd. Our employees won't want to do this.
 - i. We have training and implementation specialists that will help get your employees excited about using NetSuite.

6. Visual Aids-

- a.** Pricing breakdown
- b.** CRM+ Benefits
 - i.** Integration
 - ii.** 360-degree view, etc.
- c.** ERP Benefits
- d.** General Benefits
 - i.** Efficiency
 - ii.** Security
 - iii.** Real-Time updates
 - iv.** Automation
 - v.** Time Reduction
- e.** Testimonials
 - i.** SuccessFactors
 - ii.** Innovise PLC
 - iii.** Bearing Point
- f.** Screenshots