

FlexTraining - Tech Sales 101

Revised March 2022

Overview

This document contains guidelines, suggestions, and information needed to be successful at selling FlexTraining software and related services. It is the result of years of experience competing in the learning technology and online training market.

Studies have shown that, in a technology-related market, sales are not driven by product features, by the customer's needs or even by pricing. No, sales are driven first and foremost by the *actions of the sales reps*. In other words, *you have the power* to get results.

As sales professionals, we are definitely HUNTERS, not order-takers or administrators.

The Opportunity

FlexTraining has been selling in the E-Learning "space" since 1998. It has been enhanced and upgraded continuously, adding features that customers have requested. The FlexTraining system, with all its power, flexibility and ease of use, is well received by prospects and customers alike. People like it.

Selling FlexTraining can be a fairly predictable, profitable activity. "Predictable" means that additional sales activity and conversations generally produce additional results. All it takes is diligence, attention to detail, persistence, and the ability to control a sales process. It is a competitive market.

Our sales team performs both outbound calling (prospecting) and the servicing of inbound warm leads. Sales reps use a standard but flexible

process for qualifying, researching, demonstrating, managing and closing business from all sources.

We utilize a custom-built CRM we simply call the “prospect database”, which helps you track your sales activity, A/B/C prospects, “To Do” items, and notes. We have a simple, flexible methodology, a proven system, an existing infrastructure, a product that customers like, and the experience to steer you in the right direction, even while you choose your own tactics.

Our sales reps have come from all kinds of backgrounds and experience levels. Successful reps are professional, motivated, driven, consultative, and always upbeat. They understand the details of the FlexTraining system and the specific needs of each prospect. They are diligent questioners and good listeners.

Sales reps become more productive (and earn more income) quarter-by-quarter as they become more knowledgeable. You can expect to make more money during your second quarter than your first, and to make more in your second year than your first year.

Our sales professionals are 1099 “contract” reps, and we utilize performance-based pay. Thus, our sales team is compensated on a commission basis, allowing us to avoid implementing quotas and terminating members who get off to a slow start. It’s a win-win.

Our market has long been the E-Learning Platform space, where our software has created many, many happy customers, and wealthy sales reps over the years. Our gradual transition to the Cybersecurity tools and services market has just begun.

Below are the guidelines, concepts, and rules that will give you a strong chance to be successful for years to come.

Work Life Balance

Anyone who thinks long-term knows that productivity and a sense of overall well-being go hand-in-hand. We believe a work-life balance is important for everyone, no matter how hard you are currently working.

We offer a flexible schedule and the ability to utilize your own techniques and methods. And we rarely ask our people to travel, preferring to utilize modern collaboration technologies. These factors contribute to a long-term work-life balance.

There may be times when you have to go “full throttle” and work some long hours for a period of time, but that should be limited, managed, and reduced after short while. We feel that if you are working 50 hours a week and not attaining success, you may be in the wrong line of work.

Fundamentals

Selling FlexTraining is not rocket science, is not overly complex, and requires little technical skill. It does require motivation, persistence, dedication, and attention to detail. To give yourself a chance to succeed:

1. Be the guy who wants to be on the phone all day, engaged in conversation with prospects, listening to their needs and guiding their conversations in the direction we need it to go.
2. Put in full days. It's tough to be productive in a competitive market working 5 or 6 hours a day.
3. Have an “emergency mode” for when your numbers are low or you are in danger of missing your goals. Be able to go “all out” for a few weeks when times are tough.
4. Explore the FlexTraining system, all the menus and screens, and figure things out. We provide orientation and ongoing support, especially for technical questions, but you have to be willing to experiment with the software and learn it in depth. Hands-on practice and testing lead to a much deeper understanding than rote learning, and knowledge is retained longer.

5. We respect our price integrity and so we don't do a lot of discounting. The value is definitely there when it comes to FlexTraining, and discounting is an indicator of poor quality. Please have any proposed discount approved by management before offering it to a prospect.

6. Be confident while being aggressive and helpful. Remember: you have what they need, whether they know it yet or not.

7. Get the prospect's executives involved EARLY. Do an "Org Mapping" to identify affected management personnel. If you do a demo for just your single contact person you may be headed down a long road that has a dead end. Get the names of the executives whose approval you will need to get payment. Avoid throwing around terms like "decision-maker" but be firm. Here are some questions to ask:

- a. Which managers, directors, or VP's will benefit or feel the impact of this training initiative?
- b. What managers, directors, or VP's have staff or team members who will be trained?
- c. Whose office actually approves or authorizes the expenditure?

This line of questioning will go much better if you have already studied the company's operations and structure, even if it's just information you gathered on the web. Information is power.

Outreach

We use the term "outreach" to describe an organized calling program based on one or more current customers. Outreach is a type of prospecting. It leverages a current satisfied customer as a way to connect with sister companies, similar organizations, or companies in the same industry. Here is how it works:

- a. Identify a current customer who is in a certain field (like manufacturing, non-profit, law-enforcement) that has many other desirable entities or competitors. For example, a company who has sister companies under the same brand name, either nationally or internationally. Choosing a law enforcement agency, government department, school system, university or a well-known private-sector brand is also a good idea.
- b. Make sure this customer is reasonably happy, and get to know all you can about their training: who they train, what courses they deliver, what benefits it has brought, etc. Boil this down to a 30-60 second super-positive summary you can use.
- c. Build a list of related companies or organizations or entities with similar operational needs. These are good targets for outreach calling. Research their web site and operations. Gather the contact information for directors or VP's in areas like HR and Administration. Research them on LinkedIn as well.
- d. Call the list of contacts and deliver your 30-60 second story of how the FlexTraining system made a difference at the XYZ company— followed by something like (use your own words and tactics) “Can I get on your radar for a 10-minute strategy session, discovery conversation or even a 20-minute executive demo?” Follow the normal process from there.
- e. Thank your contact at the original customer for serving as a reference and share any good news about a target who has interest in talking with you.

Here is a noteworthy quote from author Mike Weinberg on what holds back most sales reps who are supposed to be true hunters:

Salespeople fail to develop new business because they are too patient and too slow to get into action. In company after company, I see salespeople waiting— waiting on the company. I hear excuses about waiting to call prospects until the new marketing materials are ready. Waiting for the new website to launch. Even waiting for warm leads. Please. Top performers in sales don't wait for anything or anyone. Clear marching orders, new sales materials, training? Leads, what's a lead? Nope, can't wait for any of those.

Best Practices:

For an inbound lead, research their web site for 10 minutes before calling. What do they sell? Who owns them? What's new there? Can you find any training history or clues? Who is on LinkedIn from this company, and will they accept my connection request?

Call each inbound lead about 10-20 minutes after their form comes through. The idea is to have first contact among all the suppliers they are reaching out to, to assure them that you have the answer before they complete 4-5 additional forms online, which you would have to compete with.

Get really good at doing demos, and do them only after you know who all the important players are. Know the system well enough that you can handle unexpected questions, and ask questions of the prospect to further qualify her. It is rare that a rep needs to have tech support in the room during a demo, especially after a rep has 3-4 months of experience.

Record yourself doing a demo, using an online tool like Join.me or GoToMeeting and watch the recording afterward. If you need help recording a demo, just ask.

Make several targeted outbound calls every day, not just when things are slow, in order to maintain a pipeline. You do not want to rely solely on inbound leads. Dig your well before you are thirsty. Never stop prospecting.

Get to be really good on the phone. Have a sharp, crisp, natural phone voice and delivery, and speak confidently and clearly. Have 2-3 talking points (or a good script you are comfortable with) that are powerful and succinct and will engage the listener quickly. Focus on customer benefits.

You will need to be really strong and persuasive in general, whether it's an initial call, a demo, or follow-up calls to ask for the business. We offer

many options and choices with FlexTraining, so it's not a matter of "if" they could use FlexTraining, it's a matter of "how".

Record yourself doing your outbound call script or introducing your talking points. Correct any weakness until you like the result. You will know.

Vary the times of day you call - for both outbound targets and inbound prospects who are hard to reach. Consider whether you want to leave voice mail messages if they are not causing the desired action. **Never expect anyone to read your e-mails.** E-mail is useful only to confirm what you talked about on the phone.

Call on prospects related to your current customers. If you have a school board customer, call every school board you can find. If you have a division of a huge company, call every other location/division/brand for that same company. Research first so you get the best contact information and use it.

We have several different sales collateral items online that you may direct a prospect to, or you can email them. for your use with your prospects. On average you will send out several items each week (good idea to ask the prospect what they thought of the item afterward), as well as occasional hand-written notes on stationery. It's a good idea to send a "thank you" note by mail after each demo or initial call.

When you prepare a quote or proposal for a prospect, be certain they know exactly what is coming and what it will look like. Surprises are not good.

Use a proposal whenever possible – it is much more effective than a single-page quote. Use our Proposal template and edit it to suite your prospect. Print it and FedEx it. Do not send a proposal or other large document as an email attachment, unless the prospect requests it.

And always stick to your selling process for discovery, investigation and presenting a solution. Do not default to the buyer's process. A good example is jumping right into a demo without knowing who the players are and what their priorities and goals are. It's usually a waste of time.

Tell stories

Your prospects will not remember a list of facts, any more than they will recall a PowerPoint slide that changed their life. (Can you?) If you want them to remember something about you or your product, it has to be in a story. Examples:

- a. FlexTraining greatly reduces the need for on-site training, and its high cost. Besides saving money, it saves space.
- b. One company almost entirely eliminated face-to-face training at its headquarters. They put a foosball table and refrigerator in their training room and turned it into a lounge for staff and management to spend time together.

Or this:

- a. Online compliance training reduces the risk of being sued for legal or safety infractions.
- b. A manufacturer we know stopped being sued after they implemented FlexTraining for compliance training, and was able to take one of their in-house lawyers and add him to the sales team.

Create (or borrow!) your own stories that you are comfortable with, and that make the point that FlexTraining brings improvements and savings.

Insights gained from experience

Since we are not order-takers, we rarely hear from prospects who are looking to buy a “learning management system” or a “universal learning platform”. Rather, people are looking to “find some online classes”. That means we have to EDUCATE them about the need for a planning, authoring, and management framework like FlexTraining.

And we have to PERSUADE them that they need **custom** training (rather than canned, generic courseware), and that FlexTraining is the only

sensible option for their needs. In other words, we have to change their minds from where they started.

We don't lie to prospects or deceive them in any way. But we do have to paint a happy scenario that illustrates how great life will be for them with FlexTraining. You need to keep the accent on the POSITIVE and make sure they are comfortable with you personally. People buy software from people they like.

Before scheduling a demo, consider using our Training Needs Analysis (TNA) walk-through with your prospect, and get back to the prospect a couple days later with your recommendations. This puts you in a consultative, helpful posture rather than a sales posture, at least for a while. You need to be an influencer, a trusted partner whose opinions matter.

Make sure you have done a thorough "organizational impact map" before you schedule a demo. This means identifying every manager and executive whose staff will be impacted (trained) by a new training system, or whose approval is needed to move forward with a purchase. Finding out about these people after a demo is too late. They need to be included in the demo itself. Asking your contact to round them up for a secondary "group" demo later on puts your contact in a tough spot, and usually fails.

When you do a demo or discuss FlexTraining features, remember that you are selling BENEFITS, not features. Never show a prospect a screen or feature unless you tell them why it's there and how it benefits them. Show them less than you think you should. Gather data during the demo and go easy on showing lots of features and screens. People have limited time – keep it simple.

Get to know the E-Learning software market and how competitive it is. People in this market will say or do anything to get business. Do some research online concerning competitors and trends.

Competitors also have been known to offer very low "entry" prices, with the intention of gaining much higher revenue later on with price increases, annual fees, or expansion. Make sure your customers are comparing

apples to apples. FlexTraining offers the most features for the money in our industry. Period.

There are a handful of carefully-selected books in the office that are available for your use. They cover topics like phone selling, price objections, and targeted industries. They were chosen because they are easy to read and they address topics and concepts we need to become expert at. You will do well to read them.

Know – or decide - how and when to use each collateral item and document, such as the short FlexTraining overview, a PowerPoint, a proposal, a quotation, the detailed benefits list, the industry features worksheet, our stationery, an invoice, or other documents. You will decide what to use and when.

You need to listen carefully as your prospects answer the open-ended questions that we need answers to. You need to CONTROL the conversation, and you need to control the flow of events. If the ball is ever “in their court” and you are waiting on them, then you have lost control and you are in trouble. Unless you act quickly, you can expect delays and eventual failure.

When a prospect asks you to do something or provide information you MUST ask for something in return. Jumping to satisfy their every request without asking for something you need in return is just groveling. And we have seen over and over that groveling does not sell software.

If a prospect hits you with a delay – some time for them to work on developing content for example – you have been handed a roadblock. Remind them that they should develop and test content right inside FlexTraining, and we will make arrangements to let them have system access to do so, at very little cost, when we sign them up (now). Or we add a month or two to the contract term and get it signed and paid. One way or another, we need the first flow (or dollar) of revenue to occur. Delays to a commitment mean the sale is at serious risk.

One way to get past the “the first dollar” hurdle is the Start Today program, which you can read about on the web site. It’s not for every situation, but it has its purpose.

Develop and nurture five rock-solid prospects to get one sale. If you hang your hat on 1-2 prospects you will likely end up with a zero for that month.

Keep your pipeline data in the Prospects database accurate and be honest enough to admit losses. If a prospect stops responding to you, don’t keep him in your “A” list.

Understand that if a prospect has been in your pipeline for more than 60 days, you have probably lost them. Every week a prospect does not close is a reduction in the chances he will ever close. At about the 45-day point, you have a problem even if you don’t know it. You must create or find some urgency or a compelling event, otherwise the delays and required “approvals” will start emerging, and they will slowly kill the sale.

It’s a tough and unforgiving business, but the upside is tremendous. We have had many sales contractors make in excess of \$100K several times in the past, and there is no doubt that you can do the same.

Efficiency vs. Effectiveness **(Use to schedule and execute sales tasks)**

We win business by being effective, not by being efficient. Compare:

Efficient:	Effective:
I just went through my 25 inbound leads and called them all. Can I have some more warm leads?	My last 5 calls to my inbound leads were not productive. Do I need to change my messaging or timing before continuing? What else can I do to get better results?
I am "done" with the inbound leads I have gotten.	What is my conversion rate (compare leads to sales) and what rate will I be satisfied with?
300 calls, 200 e-mails and 15 demos is a good month.	Two or three new customer sales is a good month.
I can get everything done in a 6-hour day.	Maybe I need to be in an "urgent mode" until I have better numbers.
All these leads are just people looking to gather information. Nothing good here.	Almost every customer comes just for information. But we must control the process and persuade them to buy something.
Got email only – no phone - from the web form. So here goes my standard email.	With a little digging I might find his phone number on the company web site or another site.
Got phone number on form - I'll bust off a quick call to her.	Research web site for 10 minutes first. Become knowledgeable about their company and buzzwords. Talk the talk.
I rapidly filled up my To Do items with old standards like "follow-up" or "touch base".	Take your time and plan a specific item like "review \$ quote vs. budget" or "schedule TNA". Or don't bother to call. Control the process.

How quickly can I get through my daily 20 outbound calls?	What kinds of training are done in this industry, or at this company? Does their web site have any news or announcements? How will they save \$ to pay for a training system? Preparation=confidence.
Left VM "Call with any questions".	He ain't gonna call. If you have to leave a VM, make it urgent: <i>Things are changing - will call you Monday morning</i> <i>No-obligation TNA next week. Day/time?</i> <i>I think you'll want to know about....</i> <i>Sending Comparison sheet, will call Friday</i>
Emailed him a big fat PDF or an Info Book and Ideas book. Boom.	Quick but useless. Grab a real book, add a note on stationery, add a business card, mail using Priority Mail from the office.
I made 30 calls today!	I had 3 in-depth conversations, and got the prospects to open up and talk about their projects.
I have done all the steps in the sales methodology and still can't get business from any of my prospects this month. Ugh!	Sales is really hard. The rapport, the trust, the persistence, the confidence that it takes to sell software is a true art. If you can do this, you can walk on water.

How to NOT meet your quota:

Put in short days.

Spend a significant amount of your time NOT on the phone with prospects.

Leave voice mails and wait for a return call (it never comes).

Don't call inbound prospect in the first half hour after his form comes through. Let your competitors talk to him first.

Be reluctant to bother a prospect. (You have what he needs, even if he does not know it yet).

Hang your hat on two or three prospects who you are certain are going to come through for you. Prospects will surprise you; they will delay their purchase repeatedly, and they will disappear.

Have a better way. Please don't. Use the tried and true ways, and follow the FlexTraining sales guidelines in this document and the recommended reading below. If you put up good numbers and a solid track record you will be listened to when you make suggestions or want to deviate from the normal path.

Account Management

If you are assigned an existing customer account to manage (whether you sold it or someone else did) you need to be active in working the account.

You should have relationships with at least TWO people within the customer organization, one an executive, that you talk to AT LEAST once per quarter.

Please do not try and answer tech support questions. You are not their tech support, you are not their conduit to tech support, and you are not their training resource. We offer those services separately, and they contribute to our revenue.

Know whether and how well they are using the system (license or L&G). Always explore the possibility of them adding other training audiences and expanding their number or users. This is the main way a non-performing account will actually perform.

It's all about expanding our customers' awareness of what is possible with FlexTraining. Sell them our management training and course building

services, but remember that you, and only you, are our REPRESENTATIVE to each assigned customer. So you are responsible for them knowing what FlexTraining can do, what they can do with it, and why they need to stick with FlexTraining year after year. Account Management is a continuous process. It's not an ATM.

If an account does not renew, and you did not see it coming well in advance and try to prevent it, then you are not managing the account at all. Ask for help if necessary. Last-minute surprises are a sign of poor account management. Not all reps will have assigned accounts, but those who do will benefit from strong account management practices.

Social Media

There is a wide variety of opinions on how effective social can be in boosting sales. Twitter and LinkedIn should be in your tool kit. Briefly:

Twitter: Twitter is an effective way to reach people and establish credibility. Establish a free account and "tweet" (publish) information such as web pages and articles to gain followers. One popular technique is to follow large numbers of people in the hope that many of them will follow you in return.

LinkedIn: Every rep in B2B sales needs to have a LinkedIn profile that is kept up to date and looks good. Detailed suggestions about how to best use LinkedIn are found in the book titled "*How to Sell On LinkedIn: 30 Tips in 30 Days*", which is highly recommended. Read, understand, and follow everything in this book. Making contact with the target prospect's management can often be done through LinkedIn. Writing and posting an article every couple weeks builds credibility.

Teamwork

We treat each other with respect at all times, and we cooperate with each other because it benefits everyone. As professionals, we expect no less of our team and of each other.

For example, if you are working in the office and you have a demo scheduled for some time that day, you need to notify any other rep who may be in the office at that time. That allows reps to observe each others' demos, and to see and hear different tactics and styles. In this way the reps learn from each other. Observing each other's demos is VERY important because we each have different styles and different backgrounds, and we use various techniques in our demos and Needs Analysis walk-throughs.

If you have a dispute about who "owns" a prospect or customer, try to resolve it respectfully between yourselves before bringing the issue to management. Aggressive, selfish, unprofessional behavior towards staff or contractors will not be tolerated.

We are all on the same team here. Let's work together to grow, gain customers, and make money!

Additional Notes About Prospecting

Yes it still critical – inbound marketing and managing existing accounts are nice, but they do not replace new customer acquisition.

You must view yourself as a Professional Problem Solver – not an annoying telemarketer. Remember that when you sit down to make your daily calls. You are important and necessary!

Proactive calling – preparation:

- Polish and personalize your "story" – like talking points, but more focused.
- When you selected your targets did you do a bit of research so you know SOMETHING about them?

- Understand your prospect: Crazy busy, over-worked, not interested in you, but very interested in his/her problems
- Focus: Customer needs, not software features or your “presentation”

Your 5-second call beginning: Rather than “I’m Bob from FlexTraining. Are you busy?”, Try “It’s Bob Smith – can I steal a minute? I head up strategic outreach for FlexTraining and...”

Talk about price LAST, not first. Instead, talk about the reasons customers buy from us. Listen hard, but control the conversation.

Questions To Ask:

- Do you have a tight training budget and schedule?
- Will everyone be happy if you continue with everything “as-is”?
- What is one thing you don’t like about your current training process (online or in-person)?
- ... Other probing questions about the organization and the major players / deciders...

While on the phone, be ready to ask – three times – for the next step. A longer discovery call? A requirements analysis walk-through? A system demo (if really necessary)?

Expect to find yourself in voicemail about $\frac{3}{4}$ of the time. So, you need to be really good at leaving voicemail messages. They will lead to future conversations. Don’t leave a phone number – leave a simple web address and tell them you will reach out again.

Summary

What makes the difference between a successful sales rep and one who fails? It's the extra things:

- The extra question you ask a prospect that finally gets him to open up and tell you what will get their business.
- The extra contact you build a relationship with at a prospect, the one you turn to when your primary contact can't get the deal done and paid for.
- The extra hour you put in at the end of each day learning how an additional FlexTraining feature works, or reaching out to one more potential lead.
- The extra call you make to a lead on your calling list, or to the guy who seems to never answer his phone, or to the economic buyer who can unlock the budget and get it done.

These "extras" make all the difference. Good luck!

Important: Suggested Reading:

New Sales Simplified

Mike Weinberg

SNAP Selling

Jill Konrath