

# Your *Trust-Based Selling* Toolkit

Gilman Partners, February 22, 2017 and March 21, 2017

More at [www.trustedadvisor.com/GilmanPartners](http://www.trustedadvisor.com/GilmanPartners)

## Tools, Practices, Mindsets, Maxims, and Ways of Being

Risk Intimacy!

Don't accelerate to solutions too quickly

"This is a crazy idea ... "

Caveat examples – (we'll talk more about these in Workshop 2!)

Screening vs. selection + what happens in each step

Consider ways to sell by doing

Be masterful listener – EARN THE RIGHT to be right

Am I doing this to add revenue or is it the best thing for the client?

Consult with the client on tough specs at the beginning vs. 30 – 60 days in

Keep notes of past conversations so you can refer back

Get off your S

Remember the search strategy discussion

\*\*\*Added since Session 2\*\*\*

Search Strategy

Swallow your BUT (BUT OUT)

BSA

"Our clients say"

Google alerts

"I'm not sure you should"

It's never too late to start

Take good notes about clients

Schedule it

Sell by doing

Early & ugly

Caveat

Sample matrix

Get comfortable being uncomfortable

Take a buddy along

LISTEN

W.A.I.T.

Pick ONE thing

Make sure you match mindsets with techniques

Trust Trifecta

Tell me more...

"Dinner with Barry"

"Lavish Lifestyles"

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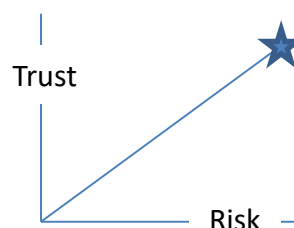
<b>TECHNIQUES</b> Tactical	Name It and Claim It		
	Paraphrase and Empathize		
<b>MODELS</b> Behavioral	The Trust Equation		The Trust Creation Process (ELFEC)
<b>MINDSETS</b> Contextual	The 3 P's of Trust	The 4 Trust Principles	4 Levels of Customer Relationship

## The Three P's of Trust

Trust is Paradoxical

Trust is Personal

Trust is Positively correlated to risk



**TA**

Think of Trusted Advisor as a role. Sometimes we're in this role; sometimes we're not

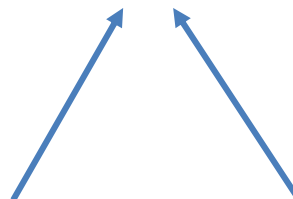
**ta**

Think of trusted advisor as a way of being. This is always possible.

Reciprocity



Listening



Paraphrase

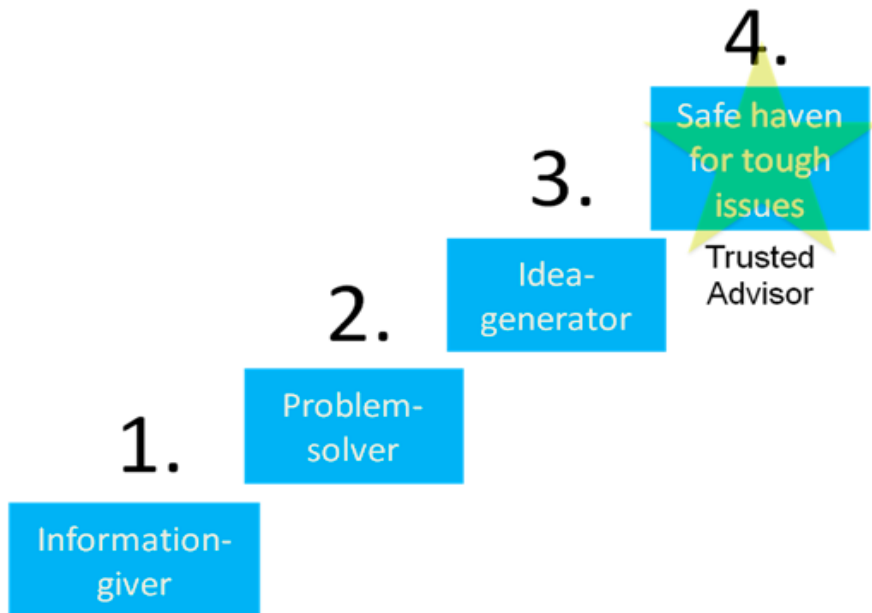
Empathize

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**“Tell me  
more.”**

**awareness  
and  
practice**

### Four Levels of Relationship



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## The Trust Equation

$$T = \frac{C + R + I}{S}$$

**T** trustworthiness  
**C** credibility  
**R** reliability  
**I** intimacy  
**S** self-orientation

Source: *The Trusted Advisor* by Maister, Green, and Galford, The Free Press, 2000

The  
objective of  
traditional  
selling

The  
objective of  
trust-based  
selling

To convince  
them to buy  
from you

To help  
them make  
the best  
decision for  
them.



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## Your Trusted Advisor

**C/I** Honest

**R** Consistency

**I/S** Listen

**I/C/S** Mentor

**S** Optimistic – cheerleader and can show how you can do

**C/I** They push back – not yes man – will challenge you

**I/S/C** Familiar – they know me and where I've been

**S** Selfless – think about my situation

**R/I** Supportive

**I** Confidential – you know it won't get out – safe space

**R/S** Available – they make time and proactive and reach out

**C** They have a global perspective – can see big/holistic picture, well-rounded – gives me insight into other options/bigger picture

**I/C** Forthright – say what needs to be said

**C/R** Logical – they can consistently think through the process and the situation

**C** Wise – have different life experiences and they can offer different perspectives

**I/S** Caring



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## What are the natural results when you are trusted by your clients?

There's no need for formal RFP/contract negotiations

More forgiving

They let you know sooner when there are issues

They ask your advice on things even outside the business task

The relationship is easy – you want to work with them

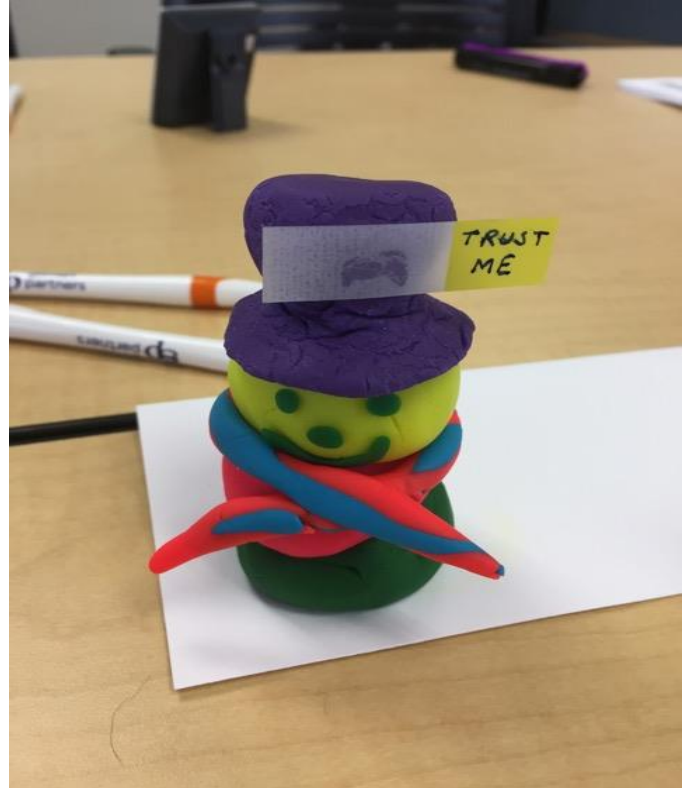
They have high expectations for consistent delivery – you are part of their team

You have conversations continually even when no business task is ongoing

They call you instead of you calling them

They refer work to you

Shorter sales cycle



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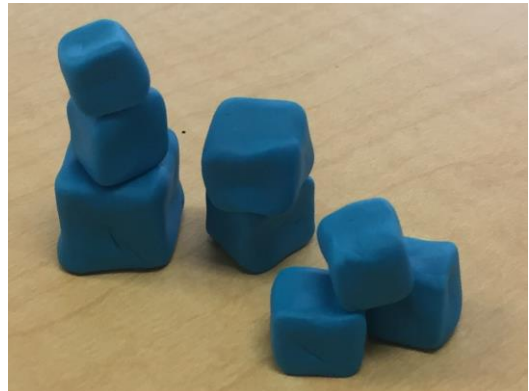


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Screening	Selection
Answer the question: “Can they do the job?”	Answer the question: “Do we want to work with them?”
Narrow	Decide
Research	Personal Interaction
Firm	People
Expertise, scale, geography, qualifications	Fit, comfort
Market the firm	Sell the people
Credibility and Reliability	Intimacy and Self Orientation



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## How might we do more selling by doing?

Instead of saying: “Here’s what we’ll do to get to know you –” replace with:

“Here’s what I know about you already → here’s what I’m curious about” (specific piece of data)

Share the draft search strategy, our partnerships / examples of how we’ve done this thing for this client, offer them a reference

Use informed questions that show we have done research Being transparent – I want to understand X so I am confident we can do Y

Come with 3 candidates we thought might fit their need based on what we know so far. Ask “are we close?”

Do this using blocked our profiles and/or sample candidates we recently placed

Share profiles on people we may actually know

## How might we do more selling by doing NOW?

Pre-search – gather information about them and we share our insights with them

Ask about their culture and what candidates they will like – what will allow us to engage passive candidates?

We have a deck that we don’t walk through it – leave behind: “What’s most important for us to share with you” – focus in on the specifics of the search (what are you looking for/ what have you tried/ why didn’t it work?)

Have more interaction early/before the meeting

Caveat...Here’s what I came up with – what do you like/not like?

Treat the meeting like our first “weekly call”

Share companies we think may be good sources for their candidates

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## Leveraging the 4 Trust Principles as BD Strategies

<b>COLLABORATION</b> <ul style="list-style-type: none"><li>• Explore what you really need:<ul style="list-style-type: none"><li>• Even if we aren't the ones to do it – give them permission to use others' and check-in on it</li><li>• "There's a better way to this"</li></ul></li><li>• Meet early and often &amp; adjust</li><li>• Keep asking</li><li>• Seek referrals through collaboration</li><li>• Partner with another vendor to bring specific service</li><li>• High level leads group<ul style="list-style-type: none"><li>• Investment vs. industry</li><li>• Partner with another vendor to bring specific service</li></ul></li><li>• Offer other clients as resources for a specific client challenge</li><li>• Collaborate internally too!</li></ul>	<b>TRANSPARENCY</b> <ul style="list-style-type: none"><li>• Share "your story" – why you are here</li><li>• Say <u>NO</u> when it's not our sweet spot / or we don't want to do it</li><li>• Ask for the business</li><li>• Be open/honest about conditions/concerns – pushback</li><li>• Share fees/model at beginning of conversation</li><li>• Acknowledge we are setting up talent advisory services</li></ul>
<b>MEDIUM TO LONG TERM</b> <ul style="list-style-type: none"><li>• Meeting without agenda for clients and candidates</li><li>• Call just to check in – with clients and candidates</li><li>• Pay attention to their activities (follow on LinkedIn, etc)</li><li>• Stay connected to those you've screened out</li></ul>	<b>OTHER FOCUS</b> <ul style="list-style-type: none"><li>• Meeting face-to-face<ul style="list-style-type: none"><li>• More check-ins</li><li>• More interactions</li></ul></li><li>• Ask Questions<ul style="list-style-type: none"><li>• Get curious – what's going on – not just about <u>OUR</u> business</li><li>• Expertise/interest</li></ul></li><li>• Share vendors/other ideas that may help them</li><li>• Invite prospect to go to an event with you</li></ul>

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## NICI Scenarios

### UNRESPONSIVE CLIENT

#### The Issue / Hard Truth:

- "We haven't connected"
- "You've been unresponsive in returning calls, providing interview times, etc."
- "I haven't heard back from you."

#### Caveats:

- "I get the feeling that this isn't a priority for you."
- "There's no easy way to say..."
- "This is hard for me to say..."

### WE NEED TO TALK PRICE

#### The Issue / Hard Truth:

- "We need to discuss price"
  - Economics
  - Business terms
- "This is going to cost you X"

#### Caveats:

- "Well, let's get down to brass tacks"
- "This is the part that's not fun"
- "Let's talk economics"
- "How about we talk dollars.."

### NEW WORK, EXISTING CLIENT

#### The Issue / Hard Truth:

- Are there other opportunities we can talk about?

#### Caveats:

- We don't want to sound overly salesy
- You may have relationships with other recruiters

### NEW WORK WITH FRIEND OR FORMER COLLEAGUE

#### The Issue / Hard Truth:

- Can we talk about how I might help you/ we might work together?

#### Caveats:

- "We've lived next door for 10 years and..."
- I only see you here and I am wondering...
- "I've been meaning to ask you..."

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## **BD Routines and Rituals**

### **DAILY**

- Read LinkedIn feed/notifications – Like and Share
- Google Alerts – Respond to them when they pop-up

### **WEEKLY**

- Business courier skim and reach out
- Post/share article to network that may be of interest
- Continue to try and reach out to old client/not placed candidate to see what happened next

### **MONTHLY**

- Review prior months Daily/Weekly activities and set new BD goals
- Pick 1 hard client/1 hard candidate and finally reach out

### **QUARTERLY**

- Round tables
- Quarterly tombstone – metrics/placements share with clients, contacts and CEOs
- Review who we worked with and touch base and the placed candidates

### **ANNUALLY**

- Hold strategy BD planning session to set target companies/industries
- Do year-end review of results of BD activities
- Hold client appreciation event

### **OTHER**

- Co-sponsor event and / or host speaker
- Recognize success in client/candidate activity and congratulate

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## Selling Scenarios

Prospective/targeting

Existing / Returning clients

(a) Same type of search

(b) Different type of search

Competitive – firm need

(a) compete with other firm

(b) compete with internal team

RFP

Referrals – firm

Exploring/investigate

Networking opportunity

Share experience internally



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## Selling Scenarios

<b>Existing Client – New Search</b> <ul style="list-style-type: none"><li>• Just ask permission / use caveats</li><li>• Announcement of all placements</li><li>• Show our breadth in other ways</li><li>• Show /Introduce JD / search strategy for other searches to show skills</li><li>• Closing meeting</li><li>• Introduce other GP people to them – show other skill sets</li><li>• Introduce practice leads – a reason to bring them out</li></ul>	<b>New Prospects</b> <ul style="list-style-type: none"><li>• Round tables</li><li>• Introduce / connect them to someone else</li><li>• X-Ray websites of warm leads – sent / shared sanitized profiles</li><li>• Salary Survey</li><li>• Sample slate of candidates</li><li>• Talent Trends – sharing</li><li>• Setup Listening session</li><li>• Ask client to take BSA</li><li>• Offering Job Analysis/search strategy</li><li>• Speaking events</li></ul>
<b>Referrals</b> <ul style="list-style-type: none"><li>• More prep – at least some</li><li>• Call referral source for G2</li><li>• Treat 1<sup>st</sup> meeting as the kickoff</li><li>• Be provocative – e.g. “what about...?”</li><li>• Don’t expect answers, give them things to think about</li><li>• Get back right away to set the meeting</li><li>• Ask for permission, ask what THEY want</li></ul>	<b>Competitive</b> <ul style="list-style-type: none"><li>• Ask them to take the BSA</li><li>• Bring Sample Profiles</li><li>• Bring list of target companies</li><li>• Bring Comp Data</li><li>• Collaborate on Search Strategy</li><li>• Develop or react to a candidate profile</li><li>• Show Template / sample slate (Characteristics and experience)</li></ul>

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## Listening Phrases

- “It sounds like ... ”
- “So what I’m hearing is ... ”
- “I can imagine ... ”
- “If I were you I’d feel ... ”
- “Tell me more [about it] ... ”
- “Let’s explore that ... ”
- “If I understand correctly ... ”
- “If I can say that back to you to be sure I’ve got it ... ”
- “I could imagine that might be ... ”
- “That sounds  
<frustrating/exciting/etc.> ... ”
- “In other words ... ”
- “If I were you, I might be ... ”
- “Am I correct in thinking...”
- “Is this an example of what you mean...”
- “Given X, Y, Z, I am wondering about...”

- “What’s most important to you?”
- “What else?”
- “Can you tell me more about why that is critical / important for the role?”
- “Tell me more about “X”criteria...”
- “May I recap what we just discussed?”

## Mastery Moves

Use non-verbals

Paraphrase

Audible pauses

Tell me more...

<Silence>

“I’m not sure what to say”

“Let me think about that”

W.A. I . T. (Why Am I Talking?)

Ask permission to take notes

Take a breath

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## Lunch & Learn Topics

Setting up Google Alerts

BD Scorecard for ourselves

What tools can we use to keep track of network/candidates/clients

Other selling scenarios for Selling by Doing

Selling Situation Debriefs – what happened?

Why “retained”

New trends doc/2<sup>nd</sup> quarter follow-up



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