



## Conducting the [Sales Conversation](#)

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People in intangible services businesses<sup>1</sup> often don't like being seen as salespeople; and they **especially** don't like seeing **themselves** as salespeople. At the heart of their discomfort is the face-to-face sales conversation itself, which many professionals feel is somehow unprofessional and unethical. They want to be trusted, and they feel that selling violates trust. Until they resolve that contradiction—until they believe that trust and selling are not inconsistent—they never will feel at ease selling.

Buying a professional service is less about rational decision-making than it is an exercise in risk-reduction. Simply put, trust is potentially the most powerful driver of client buying behavior for intangible services. When genuine trust is present, it overwhelms other considerations. Buyers focus less than providers think on evaluating solutions, and more than they think on assessing trust. Buyers don't trust themselves to be experts—they want experts they feel they can trust.



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It isn't just providers who cause lapses in trust creation. Clients—almost always without meaning to do so—frequently derail the trust creation process. The main reason for both parties' lapses is fear. The provider is afraid of rejection, of losing the business, but especially of not having the answer—a failure

which he or she experiences personally as a failure of professionalism. The client's primary fear is being bamboozled—taken advantage of through ignorance of an area where the provider is the acknowledged expert.

When the trust process is followed by both buyer and seller, trust is created and trust-based buying can happen. When the process is violated—usually by jumping ahead in the sequence—trust is not created, and may even be destroyed. The buyer is then forced back to choosing on the basis of features and price—something he or she would prefer not to do.

The development of trust can be described in a five-stage process — shown in Figure 1 — that is the heart of trust-based selling.

The potholes of selling arise from violating the five-step sequential process of trust creation.

**Figure 1. Trust Development Process (ELFEC)<sup>2</sup>**



**Engage** the client in an **open discussion** about issues that are key to the client;

**Listen** to what is **important** and **real** to the client; **earn the right** to offer solutions;

**Frame** the true **root** issue, **without the language of blame**, via caveats, problem statements and hypotheses; take personal risks to explore sensitive issues—articulate a point of view; create by giving away;

**Envision** an **alternate** reality, including **win-win** specific descriptions of outcomes and results, including emotional and political states; clarify benefits—make clear what's at stake; be tangible about future states;

**Commit** to actionable next steps that imply significant commitment and movement on the part of each party.

There are two players in the trust game—provider and client. Each can violate the five

*Clients—almost always without meaning to do so—frequently derail the trust creation process.*



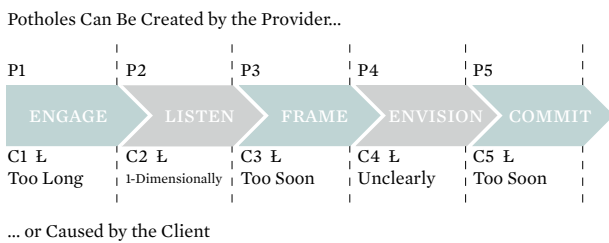
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steps of trust creation; 2 players x 5 steps equals 10 potholes on the road to trust.

Figure 2 shows how providers—and clients—can violate the trust process by getting stuck in the potholes.

**Figure 2: The Ten Trust Process Potholes**



Each trust process violation results in a different, specific mistake. Words are sometimes the cause and sometimes the effect of problems, but always provide the clue of what pothole we're stuck in. Table 2 shows the typical language by which we can recognize each mistake. Play back your own sales conversations in your mind and see how many potholes you recognize.

**Table 2: Spotting the Ten Potholes—Verbal Tip-Offs**

	Provider	Client
Engaging too long	<b>P1.</b> "Let me tell you all about us and about all our past clients."	<b>C1.</b> "So, tell us more about you, and why we should use you"
Listening 1-dimensionally	<b>P2.</b> "Let me get the following data; OK, got it, thank you very much."	<b>C2.</b> "I'm busy, let's stay focused, what do you need to know, here's the data."
Framing too soon	<b>P3.</b> "Your problem is XYZ... and we've seen it before"	<b>C3.</b> "Let me tell you our issue, and what we need you to do"
Envisioning unclearly	<b>P4.</b> "This is really going to make X, Y and Z a whole lot better for you"	<b>C4.</b> "What we need to get out of all this is..."
Committing too soon	<b>P5.</b> "Why don't we..." —"What if we..." —"What you need to do is..."	<b>C5.</b> "You're the expert, what do you recommend?" —"So, um, what should we do?"

Following is a pothole-by-pothole listing, including what drives us into the pothole, why it is a problem, what can be done about it, and—especially—what to say.



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### POTHOLE P1. PROVIDER ENGAGES TOO LONG

**“Let me tell you all about us and about all our past clients.”**

#### **Why It Happens**

Providers believe that clients are interested in their credentials. After all, that’s what they

*Providers believe that clients are interested in their credentials.*

asked about, what the provider spent so many years accumulating, what the provider’s peers always talk about at conventions, and what client conversations are usually about. But clients are only interested in credentials as qualifying tools—

they are table stakes. They **expect** you to have expertise; the question is, are you the expert who can make them confident and comfortable?

#### **Why It’s a Problem**

Clients have probably spent a considerable amount of time deciding whether or not to invite you in for a conversation in the first place. Once you are in the door, they are not particularly interested in rehashing the reasons that got you there; they want to hear

what you have to say about them, not about your last client. And, they are impatient to find out, no matter how polite they may sound (see C1). Since clients are on some level afraid of the experts’ expertise, continued display of that expertise actually has a negative effect.

#### **What to Do**

For the most part, talk about credentials only if the client asks about them; and then, limit the amount of time you spend talking about them.

#### *What to Say:*

*“Let me speak briefly about us, then move on to you. I’ll expand on any point you wish, but I want to make sure our focus is on you.”*

### POTHOLE C1. CLIENT ENGAGES TOO LONG

**“So, tell us more about you and why we should use you?”**

#### **Why It Happens**

This is usually a “holding pattern” comment by a client who is afraid. It may be a client who is inexperienced at dealing with professionals. It is natural, when a problem is



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still not clearly defined in the client's mind, to feel hesitant about sharing that lack of clarity with someone who feels like a stranger. In either case, until trust is created, fear rules.

### **Why It's a Problem**

When a client over-focuses on qualifications, the real client issues are not being talked

*When a client over-focuses on qualifications, the real client issues are not being talked about.*

about. The implicit message is that the client will make the decision alone, without benefit of any real "sample" of the provider's ability applied to the issue at hand. You wouldn't choose a pediatrician for your child by reviewing credentials alone; you want to see how your child and the pediatrician interact,

then make up your mind.

### **What to Do**

Answer the questions directly, then ask for permission to move along the real issues.

*What to Say:*

*"Well, one significant thing about us is [XYZ]. People use us for different reasons, however, depending on their situation. Would it be OK to talk about your*

*specific situation? Then I could say more about why us, or not us."*

### **POTHOLE P2. PROVIDER DOES 1 DIMENSIONAL LISTENING**

**"Let me get the following data; OK, got it, thank you very much."**

#### **Why It Happens.**

The main reason providers listen one-dimensionally is they think the sales conversation is about content mastery and expertise. That is what the provider has prepared for. He or she then believes that the role of listening is to confirm or disconfirm rational hypotheses created in advance of the meeting. But that's only one role of listening, and in many ways not the key role.

The second reason for inadequate listening is fear of appearing ignorant. Most providers use too much airtime. What passes for listening is really time spent waiting for the client to stop talking so that they can demo more content expertise. You know when this happens to you; so do your clients.

#### **Why It's a Problem**

All client interactions must involve listening



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in three dimensions. The first dimension is obvious—getting the data. The second dimension is understanding the context. The vital third dimension, often overlooked, is acknowledgement.

You may have asked all the right questions, even made sure to understand the context, but if the client doesn't know that you understand what you have heard, then you will not have earned the right to proceed further in the discussion. You may move on to framing, envisioning, and commitment—but if you haven't earned the right, the client is waiting for you way back at listening, and you will not get the sale. Understanding is only half the battle; the client must have grounds to **know** you understand.

All this applies, by the way, not just to rational data, but to the non-rational side of things as well. If you don't remember to ask how your client feels about an issue (data), or why (context), much less forget to acknowledge their feelings (empathy), you will equally fail to earn the right. Listening is a three dimensional activity.

*Listening is a three dimensional activity.*

not have earned the right to proceed further in the discussion. You may move on to framing, envisioning, and commitment—but if you haven't earned the right,

### What to Do

Focus a bit more on context, a lot more on acknowledgment. Resist the urge to fill up quiet spots by talking, wait for the client to talk.

*What to Say:*

*“Tell me more. How did that come about? What’s behind that? I want to make sure I’ve got this right, let me play it back. Wow, that must have been...”*

### POTHOLE C2. CLIENT INVITES 1-DIMENSIONAL LISTENING

**“I’m busy, let’s stay focused, what do you need to know, here’s the data.”**

#### Why It Happens

Providers can be somewhat in awe of their clients; they forget that the clients are also somewhat afraid of them! A perfectly natural client response to this concern is to keep the conversation in a tightly bounded area by controlling the agenda, the time, and particularly by keeping the discussion within largely rational bounds (“You take the risk, Mr. Consultant, I’ll just lay back here and second-guess you.”)



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### Why It's a Problem

If the agenda is too controlled, the time too tightly managed, and the discussion limited to pre-determined and largely rational areas, then the issue can't be fully explored. Any outcomes are compromised from the outset. Even if you happen upon the right answer, you

haven't acknowledged the client's feelings, which means that on some level you haven't earned the right to move forward—even if it was the client who kept you from earning that right.

### What to Do

Take on 98% of the responsibility for understanding the issue. Ask for help, furrow your brow, confess ignorance and profess concern for getting it right. Make yourself unthreatening and willing to take guidance from the knowledgeable party, the client.

*What to Say:*

*"All right, I see what you're saying. Now—please help me understand what led to that problem, what's behind it, how you came*

*to see this is as the central issue—please tell me more so I can understand it almost as well as you. Let me make sure I got that; gosh, that must have been..."*

### POTHOLE P3. PROVIDER FRAMES TOO SOON

**"Your problem is XYZ...and we've seen it before."**

### Why It Happens

Most providers evaluate themselves on the basis of their technical excellence. They expect their clients to do so as well. When they listen, they are listening mainly to "figure out" the problem, the answer, and how they can help solve it.

### Why It's a Problem

Being first with the answer may have been important in school, but it doesn't help create trust—it can make you look smug. You may think it adds credibility to say you've seen a client's problem before, but the client can experience it as trivializing their problem and as depersonalizing the interaction. Be careful.

### What to Do

Just "don't go there." Don't do it. Resist

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the temptation to speak. Until, that is, you've really completed the Listening phase.

*What to Say:*

*If you really can't resist the temptation to speak, you might say, "Let me just make a note to come back after we talk more and ask you about XYZ as an issue here; now, please go on, tell me more."*

*Most clients think it is their responsibility to define the problem clearly. Many are afraid that if they don't, they will be taken advantage of.*

### **POTHOLE C3. CLIENT FRAMES TOO SOON.**

**"Let me tell you our issue and what we need you to do."**

#### **Why It Happens**

Most clients think it is their responsibility to define the problem clearly. Many are afraid that if they don't, they will be taken advantage of. And many have a vested emotional interest in their issue statement, having gone

through various difficulties to arrive at it.

#### **Why It's a Problem**

The real problem almost never turns out to be what the client said it was in the first place. This has nothing to do with any client

inadequacy; it is the nature of complex situations that they are not transparently clear at first sight. Jumping too soon to framing the problem statement sets in concrete something that needs to evolve. Framing too soon means plans, budgets, expectations, work steps and mindsets are all locked in. And once locked in, they are difficult for both parties to revisit.

#### **What to Do**

Work the trust process sequence—go back to listening. Don't fight framing with framing—don't argue the case. Move back to listening, and seek to understand what went into the framing. If it's incorrect, it'll be revealed in due time, without anyone having had to appear wrong. Do not engage in a framing debate before you have a shared view of the data; you will simply frustrate the client and lose the argument. The only thing you'll convince the client of is that you are argumentative and arrogant.

*What to Say:*

*"All right, I see what you're saying. Now—please help me understand what led to that problem, what's behind it, how you came to see this is as the central issue—please*





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*tell me more so I can understand it almost as well as you.”*

### POTHOLE P4. PROVIDER ENVISIONS UNCLEARLY.

**“This is really going to make X, Y and Z a whole lot better for you.”**

#### **Why It Happens**

Envisioning is the most comfortable of the five trust process steps for both client and provider. This is because it deals with optimism, the future, blue-sky and possibilities. Clients and providers are both so glad of a chance to agree on

positive, forward-looking things that they can end up nodding their heads in agreement to something that doesn't really exist. Finding common ground is indeed critical; but you can't afford to find it just by climbing up the ladder of abstraction. Good envisioning has to include some very concrete, tangible examples.

#### **Why It's a Problem**

Envisioning is a key part of the trust-

building process that is sometimes overlooked. It articulates desired end-states. It helps clients see what is at stake, and helps identify measurements of success. But if not preceded by listening and framing, envisioning alone can be vague and overstated. It can lead to misunderstandings unless anchored in specifics. The risk is that the client will make tacit assumptions about what you've said; and tacit assumptions are disagreements-in-waiting.

#### **What to Do**

Pepper your visioning discussion with tangibles. Ask general questions, but then follow them up with specific questions or ideas to make the general idea tangible.

#### *What to Say:*

*For every general question like “Let's think about this three years out,” ask three tangible questions, like “what would a typical day look like?” or “how many customers would we have then?”*

### POTHOLE C4. CLIENT ENVISIONS UNCLEARLY.

**“What we need to get out of all this is...”**

#### **Why It Happens**

*Envisioning is a key part of the trust-building process that is sometimes overlooked.*



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As noted above, both clients and providers want very much to be in agreement with each other. Ironically, in their haste to find common ground, they sow the seeds for later disagreement.

### **Why It's a Problem**

Many clients don't naturally envision; a client that does so is quite helpful. The risk is that the provider and the client don't share the envisioning jointly. What feels to you like a general directional statement aimed at alignment may be heard by the client as a commitment to a specific end-state deliverable. That is a recipe for misunderstandings of a very high order.

*The risk is that the provider and the client don't share the envisioning jointly.*

### **What to Do**

If a client says, "We expect this to have a major impact on our corporate culture," you need to have a specific discussion about what the end-state corporate culture will look like. Note: this is not the same as discussing how to get there; that is step 5, commitment.

*What to Say:*

*"Well, that's an intriguing thought that we*

*should definitely explore. Tell me how that compares to some specific baseline measurements now; and how we would want those same baselines to look in the future?"*

### **POTHOLE P5. PROVIDER COMMITS TOO SOON.**

**"Why don't we...what if we...what you need to do is..."**

#### **Why It Happens**

For a hundred reasons, providers think their job is to find "the answer" as soon as possible. They think clients share that view, but they don't. Clients want the assurance that someone with expertise cares enough about them to understand their situation and give them the appropriate answer. They calibrate trust, not answers.

#### **Why It's a Problem**

This may be the pothole that providers fall into most often. Recommendations made without "earning the right" by going through the full trust process will fall on deaf ears. Worse yet, if you violate the trust process and try to recommend the right answer, you will have compromised its acceptance. Being



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right is just table stakes.

All human beings reject advice if the advisor hasn't earned the right to give it. Being right hasn't got much to do with it. Otherwise, each of us would have quit smoking / started exercising / eating right the first time someone told us we should.

### **What to Do**

Just don't do it. Not until you've been through the sequence of listening (including paraphrasing and empathizing), joint framing, and joint envisioning.

#### *What to Say:*

*Don't say anything at all, until you've actually earned the right to explore specific action steps and commitments by having gone through steps 1-4. When you're finally there, the familiar who, what, when series of agreements are appropriate guidelines for discussion.*

### **POTHOLE C5. CLIENT SEEKS COMMITMENT TOO SOON.**

**“You're the expert, what do you recommend?” “So, um, what should we do?”**

#### **Why It Happens**

Clients frequently ask for action steps, quite unconsciously. They may do it out of a need for control, out of sheer curiosity, because they are worried about getting to “the answer,” or simply because they are not sure what to say and want the burden of the conversation to go back to the provider.

### **Why It's a Problem**

Moving too quickly to commitment is a mistake committed at least as often by clients as it is by providers. It presents a real dilemma for the provider. If you don't give an answer, you appear evasive. If you do give an answer, you may be wrong. Providers routinely do the wrong thing—they provide cautious half-answers, hedging their bets and asking for time. This only makes clients more suspicious.

### **What to Do**

This is only a problem because the process hasn't been completed; and that's just what you need to say. Say that because the situation hasn't been clarified, there are still multiple options—and then say exactly what those options are and are not, based on the perspective available at that point. Pointing out the variety of options is precisely what



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legitimizes going back in-process, usually to the listening step.

*What to Say:*

*“Well, if I had to guess right now, I’d bet the answer will be A. It is also possible that we’ll end up recommending B or C; I don’t think D or E are likely possibilities at this point. To figure out whether it’s A, B or C, we’ll need to understand X. Can we go back and explore X now? Then we can revisit your question based on solid understanding.”*

### SAFE DRIVING

The material above discussed how to avoid and get out of “potholes” in the sales conversation. How does one use the trust process to avoid them in the first place?

A fuller discussion of the trust process is contained in the book [The Trusted Advisor](#), where a whole chapter is devoted to each of the steps in the trust creation process. However, Table 3 applies those steps specifically to the sales conversation; it shows both some sample phrases to be used at each stage of the conversation, as well as the phrases that indicate closure of one stage and the start of another.

**Table 3: Language for Safe Driving: Selling via the Trust Process**

Stage in the Trust Process	In the Stage	Closure
<b>Engage</b>	I understand you’re concerned about XYZ; is that right, and might I share some thoughts with you on the subject?	It sounds like we’ve got something worth talking about; are you willing to spend some time telling me about your situation?
<b>Listen</b>	Tell me about X... What was the context for X... So, if I’ve got it right... I see, that must have been...	All right; let me play back these key points so we’re both sure we’ve got the same understanding, OK?
<b>Frame</b>	What is the problem statement? What does that imply for everyone, including us?	It seems to me that what we’re facing here is....; is that the essence of it?
<b>Envision</b>	What would that look like? What would be different, and how?	So, the to-be state looks like this, and has these benefits and tradeoffs; is that right?
<b>Commit</b>	What has to be done to get from here to there?	So—who, what and when—and how can we make sure we’re both honest about progress?



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The key is staying in process—that is, in the trust process. Buyers of intangible services are not simply super-computers who approach problems supra-rationally. They are that of course; but they are also human beings, with all the complexity and richness that implies. They greatly prefer to buy from other human beings they can trust; people who are credible, reliable, perceived as safe, and who care about them. Trusted advisors.

1. *Intangible services include: the professions—law, accounting, consulting, advertising and PR; HR, internal consultants and staff functions like law and accounting; many financial services—private banking, financial advising, insurance, and brokerage; B2B software—ERP and CRM systems and databases; and various out-sourced corporate functions like call centers, telecom/computer service contracts, benefits administration, and real property management.*
2. *For detail, see [The Trusted Advisor](#); Maister, Green, Galford; Free Press, 2000*

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