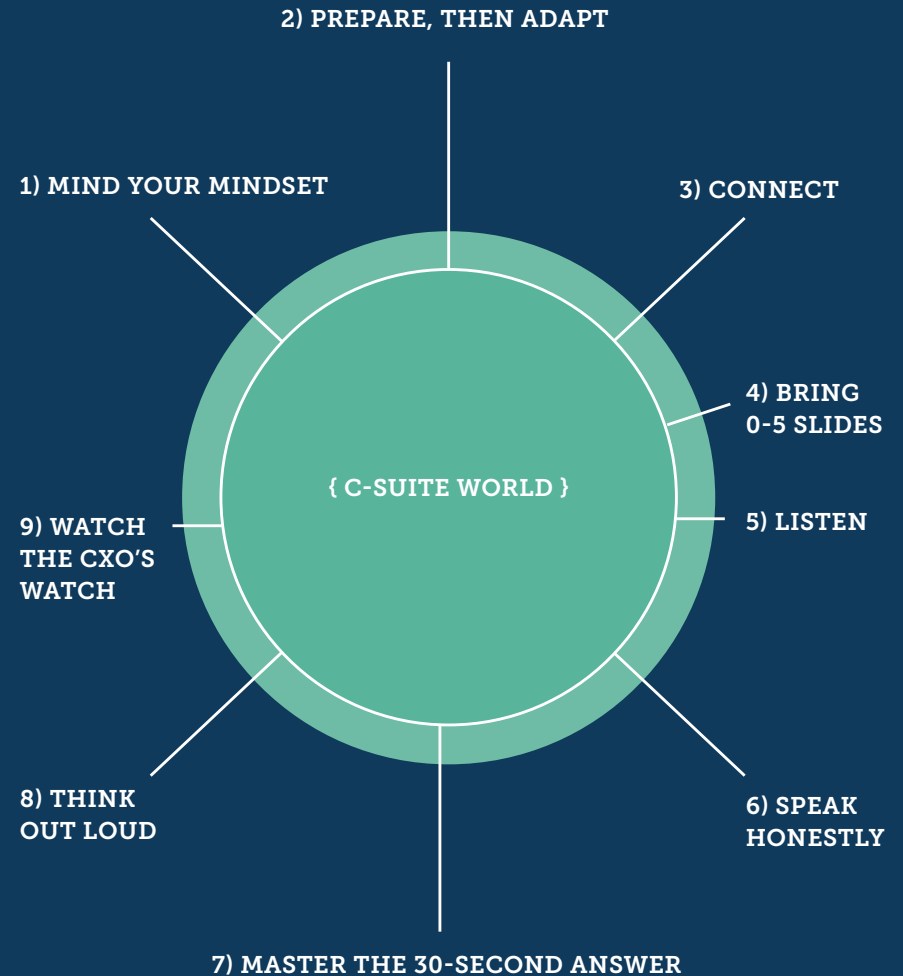


HOW TO SELL TO the C-Suite

Abstracted from *The Trusted Advisor Fieldbook: A Comprehensive Toolkit for Leading with Trust*, by **Charles H. Green** and **Andrea P. Howe**. John Wiley & Sons, Inc. October, 2011.
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How to Sell to the C-Suite

The stakes are high when you are dealing with C-level executives such as the chief executive, financial or technology officers (CXO for short), and the challenges of selling to the executive level are unique. Discomfort, fear, and a need to make the sale at all costs are all common experiences, and all impede your ability to lead with trust. C-level executives are bombarded by people trying to sell them products, services and ideas all the time, but they are rarely approached by people who are willing to

put the executive first, the relationship second, the sale third, and their own ego last.

To sell to the C-suite, first learn about their world, their needs and how they think. Next mentally prepare for the big game at the C-level. Then use our nine best practices for building trust with C-level executives.

This approach will set you apart from others who compete for executive attention and will pave the way for a *relationship*. Very quickly, that relationship will be worth more than any single sale. A lost sale in the C-suite is not a failure if trust is earned in the process.

It's a Different World in the C-Suite

C-level executives really are different. Below are five major differences that distinguish them from other potential customers, and how you can adapt in a trust-building way.

SPHERE OF INFLUENCE

The CXO has responsibility across the entire organization. So the onus is on you to:

- Put more emphasis on the why of your proposal than the how
- Adopt the language of organizations: strategy, impact, change.

RESOURCE CONSTRAINTS

A CXO works with inadequate resources under difficult deadlines. There isn't time, budget, or resources to say yes to many of the requests received.

To respect this:

- Be quick to demonstrate the value you bring
- Come prepared to directly describe a real problem and your solution
- Be concise and clear in your communications
- Serve as a sounding board.

DATA OVERLOAD

The CXO is besieged with incomplete, inconclusive or contradictory data.

You are of service when you:

- Help simplify, clarify, and focus
- Help identify the few critical factors in making a decision.

ISOLATION

It's lonely at the top. The information a CXO receives is often filtered by subordinates, suppliers, and others who have their own agenda, who don't want to deliver bad news, or who are operating from fear. You make a difference when you:

- Tell the truth as directly as you can
- Deliver bad news immediately
- Are willing to say "I don't know"

- Avoid "spin" at all costs
- Become someone the CXO can turn to for counsel.

COMPLEX DECISIONS

The CXO is faced with many complex decisions, and is ultimately responsible for them. The buck stops there. Leading with trust means you:

- Help the CXO make the decision that is right for the organization as a whole, not right for a portion of it, or right for you
- Respect a decision to do nothing, recognizing that sometimes this is a CXO's best choice
- Focus on being a helpful part of the decision-making process, not on the decision itself.

The Zen of Selling to the C-Suite

When building relationships in the C-suite, your mental preparation matters as much, if not more, as your slide presentation and leave-behind documents. Think about it: you have done your research and gone over the presentation until you know it cold. But have you prepared your mind for a C-level meeting? Probably not. Yet your state of mind matters. Why not spend at least as much time managing yourself as you do managing tasks?

Applying the Zen of C-suite selling means you:

1. Manage your motives—think about when *not* to sell to the C-suite

2. Manage your role—are you presenting yourself as a salesperson—or a sounding board?

3. Manage your emotions—keep your own personal reactions in check.

A lost sale in the C-suite is not a failure if trust is earned in the process.

Manage Your Motives

There are many good reasons to target your sales efforts at the C-suite, including your offering's organization-wide benefit. On the other hand, there are several really bad reasons to explore before you walk through the executive door.

1. You have not succeeded at the lower levels of the organization. If you find yourself thinking that a higher-up would better appreciate the enormous value provided by your offering, think again. This optimism implies that your partner at the lower level is incompetent or ineffective—both of which are dangerous assumptions. If a lower-level partner has rejected what you are selling, invest your time and energy to find out how you or your offering are unattractive, rather than trying to work around your current buyer.

2. You think the C-suite is the only place real work gets done. An organization is a system: everyone matters and everyone plays a part. No one knows this better than

a C-level executive. Overvaluing the role and influence of the C-suite limits your view and diminishes your ability to be effective. Even if your relationship to the organization begins at the C-suite, you will inevitably need to build bonds at lower levels of the organization to be effective. It only takes the slightest bit of elitist attitude to impede trust.

3. You want the badge of honor. Let's be honest: it is a rush to interact at the senior-most levels of an organization. Do not let your ego run the show. Engaging with the C-suite gives you access to an organization's inner circle. This is a privileged place, from which you have the opportunity to serve the entire organization

by influencing the agenda, introducing ideas, and bringing perspectives to bear. Treat it as an honor, not a trophy.

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Manage Your Role

A trusted advisor in the C-suite is a sounding board, first and foremost, not a salesperson. Leading with trust requires you to consistently value the relationship more than any one transaction. It means recognizing that the greatest value you bring a CXO is help with decision-making. Being focused on a sales pitch limits your mindset and narrows your role. On the other hand, seeing yourself as a sounding board implies that you:

- Facilitate collaborative discussions
- Explore strategic options from various points of view
- Listen with curiosity and interest

- Come as close as you can to feeling what it must be like to be this CXO facing these issues or opportunities
- Identify ways you can help the CXO make a decision that is right for her organization
- Speak the truth in a direct, respectful, and unvarnished way
- Demonstrate a willingness to see things through
- Recommend or support that no decision be made if choosing to do nothing is the best decision.

*A trusted advisor in the C-suite is a sounding board, first and foremost, **not a salesperson.***

Manage Your Emotions

It's easy to be off your game when dealing with C-level executives. You may be confident in your offering and still feel intimidated, nervous or overwhelmed. Or your competitive nature may dominate because you're playing at the highest level. Either way, your focus is on yourself and not the executive, which decreases trust and increases relationship mistakes, such as:

- You **fall back into patterns or habits that are comfortable**, but not necessarily effective—like the march of a thousand slides, or being overly aggressive

- You **allow the pressures of time to dominate**, attempting to get all of your credentials and the reasons for buying out on the table in the first few minutes of your meeting
- You **overpromise** out of anxiety or eagerness, and therefore sell something you cannot deliver

- You **fail to make an emotional connection** with the CXO because you are preoccupied with your own concerns and interests.

All of these reactions are natural. And all of them damage trust.

Nine Best Practices for Successful C-Suite Meetings

1. Mind your mindset. Be curious. Be helpful. Focus not on your sale but on helping the CXO do the right thing. Be a partner having a dialog among equals.

2. Prepare, then adapt.

Prepare to your usual high-quality standards, knowing the right move in the moment may be to leave any or all of your hard work behind—on the table, in your bag, or on your laptop. Remember, the relationship is the customer. Put your focus *there*.

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3. Make connecting a priority. Even in a brief meeting, spend some time getting to know the CXO as a person. Be alert to all the cues that are available to you about who he is and what matters to him, personally as well as professionally. Without a more personal connection, you are just another salesperson. With a connection, you are someone who can be trusted to help define and shape the problems and opportunities.

4. Bring five slides (if any), not fifty. Keep presentations brief and to the point. Do not revisit the technical sale you already made at lower levels. Make the conclusions the headlines. Offer leave-behinds or follow-ups to provide more information when needed.

5. Listen with empathy. Really listening to the CXO means understanding where she is coming from, and what it is like to be in her shoes. Listening builds bonds and fosters curiosity. Focusing on her perspective will earn you the privilege of being listened to in return.

6. Speak plainly and honestly. CXOs often do not hear straight talk from their staff and appreciate it when they hear it from you. Have the courage to speak the hard truths.

7. Master the 30-second answer. When time is short—and when isn't it for a CXO—there is no room for lengthy explanations or spin. Practice and master the 30-second answer. Speak in headlines first, and dive into the details on cue.

8. Do your thinking out loud. Demonstrate your partnering skills by sharing the very formation of your thoughts in a transparent way. If you get it wrong or make a mistake, you have proven that you are willing to be authentic even at the risk of a little embarrassment.

9. Watch the CXO's watch, not yours. Be mindful of the time, and even more mindful of the CXO's attitude toward the time. If it is a 30-minute meeting, and the CXO is energized and engaged, you can say: "Do we have a bit more time to talk?" On the other hand, if he's looking at the clock after 15 minutes, ask: "Is this discussion on target for you? How can I best help?"

ABOUT THE AUTHORS

Charles H. Green is founder and CEO of Trusted Advisor Associates. The author of *Trust-based Selling* and co-author of *The Trusted Advisor*, he has spoken to, consulted for or done seminars about trusted relationships for, or business for a wide and global range of industries and functions. Centering on the theme of trust in business relationships, Charles works with complex organizations to improve trust in sales, internal trust between organizations, and trusted advisor relationships with external clients and customers.

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Andrea P. Howe has been in the consulting profession for 20 years. From 1992 to 2000, she worked for AMS, a \$1B technology consulting firm. Today, Andrea's clients include top global firms in accounting, consulting, and other professional services. A skilled facilitator, she has designed and delivered hundreds of off-sites, workshops, presentations, and learning programs.

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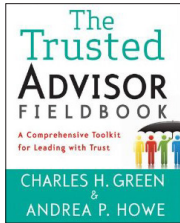
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The Trusted Advisor Fieldbook:
A Comprehensive Toolkit for Leading
with Trust. A practical guide to
being a trusted advisor for leaders
in any industry.

In this hands-on addition to the popular book *The Trusted Advisor*, you'll find answers to pervasive questions about trust and leadership—such as how to develop business with trust, nurture trust-based relationships, build and run a trustworthy organization, and develop your trust skill set. This pragmatic workbook is one you will want to reference again and again. It delivers everyday tools, approaches, exercises, resources, and actionable to-do lists for the wide range of situations that anyone who endeavors to be a trusted advisor inevitably encounters. The co-authors speak in concrete terms about how to dramatically improve your results in sales, relationship management, and organizational performance.