

# **Selling Professional Services**

**By Charles H. Green**  
**President, Trusted Advisor Associates**

The best sales thinking in industry at large is well researched, based on sound marketing principles, and has proven successful for many businesses. Buying, it says, is a linear process of problem definition, alternatives generation, and criteria-based selection. Selling is a distinct discipline, consisting of helping the buyer by clarifying information, answering questions and offering implications. The whole process is highly rational.

This approach to selling is taught in the best business schools, trained by the best training firms, and written in the best-selling business books. Faced with this successful industrial model of sales, many of us in the professions have come to believe that our clients must buy this way--and that we should sell this way.

Yet many of us have that nagging feeling in the belly telling us that *it just doesn't seem to work like that*. Most of us deny that feeling because we think it means we are doing a bad job of selling. It doesn't occur to us that the model itself may be wrong!

The truth is, selling professional services is different from other selling. It is more psychological and more personal. The professional services sale is by no means an irrational process—but neither can it be described in rational terms alone. The data—our belly, in this case—are right. It is the Industrial Sales Paradigm that is at fault.

There are barriers to seeing things this way. The Industrial Sales Paradigm has been internalized not only by trainers and business schools, but also by senior partners and even our clients! Yet if firms continue to use an ill-fitting model, they are passing up chances for massive improvements in efficiency and effectiveness—not to mention continuing to foster discomfort within their organizations.

## **How Things Really Work**

Those of us who sell professional services face several challenges. We are (usually) simultaneously the seller and the deliverer. The buyer buys us as well as the service. Our sales are for large amounts, with high risk-return ratios, and high levels of uncertainty about results. Both buyer and seller position the seller as an “expert.” Combined, these factors are a recipe for complex psychodynamics.

To begin with, selling and the professions tend to attract different personalities. Most sales people are extroverts, are happy to meet new people, tend to focus at the general level, and are impatient with details. The typical service

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professional is much more cautious and precise. Selling thus at puts us at odds with ourselves from the outset.

Because the seller and deliverer are usually one and the same, we cannot avoid one very uncomfortable fact—we must sell ourselves. This flies in the face of our natural reluctance to “hype” ourselves. We want to be seen (and to see ourselves) as client-focused, not self-obsessed. We want to be appreciated for our talents, without having to boast or beg.

Worse, if I am selling myself, and the client doesn’t buy, then it feels like the client is personally rejecting me. I do not have the luxury of selling a distinct product, or a separate team. I am the product; I will be personally accountable for a successful project outcome. If the client doesn’t buy, then the client must believe there is something wrong with me. It all feels very personal—because it is!

Thus, we must do something we don’t enjoy doing (selling), something that offends our sense of modesty (hyping ourselves) and may feel vaguely unethical, and that then exposes us to personal rejection as a result of having done it!

It gets worse yet. Not only must we sell our capabilities and ourselves, but clients buy our personal characteristics as much as our technical skills. They buy our character, interpersonal skills and judgment, not just our degrees and content knowledge. This is something professionals really don’t want to believe. Professionals are the least likely to believe that their selling success rests on personal characteristics. We want to believe clients buy our expertise and content.

Most people do what they are good at. Most professionals are better at abstract intellectual conceptual work than at interpersonal relations--and we know it. If the client buys based on relationships, then it feels like either a) we are in the wrong job (because it requires a skill level we have not achieved), or b) we are doing the right job wrong (because what we are good at isn’t working). Either way, we’re uncomfortable.

Selling professional services also fuels self-doubt. Few professionals, deep down, think they are “worth” their billing rates. Joe the consultant compares himself to Bill the computer salesman. Bill asks the customer to spend \$1M on a computer system. Joe asks the client to buy Joe himself, at an hourly rate that works out to more than 3 times Joe’s salary.

Joe imagines the following:

- Gosh, how can we be charging 3x my salary, it’s not fair to the client;
- Oh no, every hour I work will be under a microscope--I can’t screw up;
- Omigod, I’m not worth 3x my salary—I myself wouldn’t pay it!

If a customer sees Bill's worked-up quote sheet, Bill may feel embarrassed. But if Joe's client sees Joe's billing rates and project-pricing plan, Joe feels not just embarrassed, but ashamed. Unless he is completely at ease about his billing rate (and most people aren't), he's likely to feel complicit in some elaborately disguised misrepresentation.

Finally, clients themselves complicate matters. Imagine yourself as a client about to commit your company to half a million in professional fees for, say, a marketing strategy study. Count the ways in which you as the client would be nervous. It's a lot of money. The risk/benefit ratio can be high, and results can vary considerably. The professional knows more than you do. Failure is probably very public.

How does a client manage all that nervousness? Many turn to tangible, expertise-based content. Don't talk about trust; don't talk about concerns and fears; always ask the consultant technical questions, ones that make you sound smart. Repeat the professionals' expertise and credentials to others within the organization. Press for team credentials, tight budgets, deliverable definitions, references, timelines, milestones. Do not admit ignorance. Deny uncertainty, and seek control.

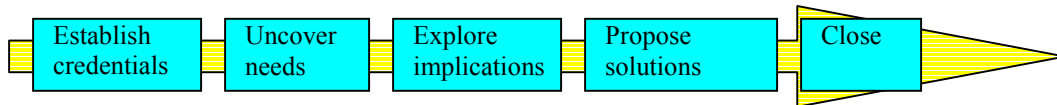
*This is a dance of denial, with everyone pretending that a complex emotional process is as "rational" as the professional's content expertise. It's not. It's messy-- because it is all about people.*

Thus client and professional unconsciously conspire to not talk about the very real psychological aspects of the buying process, and instead to talk about content and expertise. Since this avoids the real issues, each party is stressed and in denial. The end result is a vicious circle. Each party's fears lead them to "objective" criteria and process discussions, in turn reinforcing the other's view that such issues are key. This is a dance of denial--everyone pretending that a complex emotional process is purely "rational" and about content expertise. It's not. It's messy—precisely because it is not about numbers or qualifications or processes, but about people.

## The Traditional Sales Model

The leading sales models characterize buying as a special form of rational decision-making or problem solving. They use a several-step Sales Call model, such as Fig. 1.

**Figure 1. Traditional Sales Call Model**



This is a selling paradigm with three unspoken but critical assumptions:

- the seller aspires to sell better,
- the buyer follows a rational process, and
- selling is different from delivering.

All three are untrue in the case of professional services.

### **Assumption 1. The Seller Aspires to Sell Better**

One leading sales training program organizes its program around research on high-performing salespeople. Each module of the training repeats the mantra—“high-performing salespeople are characterized by...” The assumed, unspoken message is “...and of course you aspire to being a high-performing salesperson too.”

But professional services folk are not salespeople. Most aspire to content excellence well ahead of sales expertise. Many are ambivalent about selling; even see it as antithetical to professionalism. What salespeople view as best practices feel to many professionals like manipulation.

This is not a trivial issue. The biggest challenge facing sellers of professional services is to incorporate selling into their view of professionalism. Until consultants embrace as part of their professional obligation the persuasive pointing out of opportunities for improvement to their clients, they will view selling techniques as a necessary evil at best, and a con job at worst.

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### **Assumption 2. The Buying Process is Rational**

Consider these quotes, from books and materials of leading sales models:

- “Buying is a special case of decision-making.”
- “Selling is a series of business transactions in which you are a problem solver.”
- “...customers...are always looking for results.”

One leading model explicitly describes buying as a subset of cognitive decision-making, as shown in Figure 1 below:

**Figure 1. One Leading Model of Buying Decision-Making**

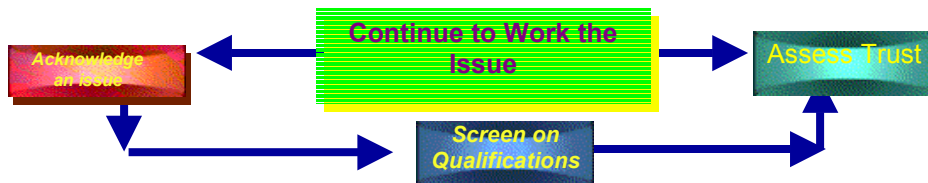


In this model, the first step is to understand the situation and the needs; the second step to define and explore solutions and implications. The last step evaluates and selects.

But in the fog-sculpting, abstract world of professional services, there is much more. The decision to hire a professional services firm opens the door to uncertainty, success, failure, advancement, fear, status, reputation, and risk—for buyer and seller alike.

Smart clients don't just compare and contrast. Smart clients know that they, and the firm they hire, will never have enough data, time or money--that they must deal with risk and uncertainty for high stakes. What they want, above all, is an advisor who can be trusted, in all respects, in the face of high levels of uncertainty. What they do is shown in Figure 2.

**Figure 2. How Clients Really buy Professional Services.**



Buyers progressively come to acknowledge an issue. They initially screen on qualifications, but then assess trust iteratively, based on continued exposure to the way the consultant addresses the particular issue facing the client. Rational thinking is important, but as a subset of a larger process of trust creation. It is not the beginning and the end of buying, merely a part of the middle.

***Assumption 3. Selling is Different from Delivering***

In industry, selling is distinct. Sales careers happen in dedicated sales organizations. Selling is a distinct part of a business process. After the Sale Event, the customer relationship is turned over to others. Title to product passes to the customer at the Sale. Sales are closed with complex contracts.

For us, it is less distinct. The seller usually is the doer (or supervises doing). Selling organizations are relatively rare. Contracts are easily cancelable, and title doesn't pass. The Industrial Sales Paradigm is unnecessary and misleading.

The truth is—the best selling is great delivery. Trust builds through real interactions of real people working real issues in real time. Professional services are an extreme case of sample-based selling; a test-drive is worth a thousand brochures. The challenge is to see selling as an inseparably integrated part of delivery, not to isolate it as a distinct process. Rather than adopting new sales practices, we should be adapting current delivery practices.

### **The Alternative: Trust-Based Selling**

We need a new paradigm for selling professional services. Buying (or choosing not to buy) isn't just a rational exercise in problem solving—it's a response to a perceived risk. The risk in buying professional services is very personal. The product is intangible, the stakes are high, the "product" being bought is partly people, the range of outcomes is wide and unclear, and the seller has command of technical expertise that the buyer does not. There is pure financial and business risk—but there is great emotional and political risk as well.

Trust-based selling is a different paradigm. It puts rational decision-making in the broader context of trust creation. It treats buyers and sellers as individuals. It is also experiential; since trust is best created through interactions between real individuals on real issues, it naturally integrates delivery work into the selling process, rather than isolating and separating the two.

The good news is—professional services selling is not only good for our clients, but a lot easier and more natural than many of us fear.

### **The Components of Trust**

Trust is a factor in all buying, not just of professional services. But what is trust? Trust is not one-dimensional; it has four components<sup>1</sup>. And the right mix of components for professional services is not the same as for other businesses.

C = credibility—has to do with words; "I can trust what he says about..."

R = reliability—has to do with actions: "I can trust that he'll do..."

I = intimacy—has to do with safety: "I can trust talking with him about..."

S = self-orientation—has to do with focus: "I can trust that he's focused on me..." (a low level of self-orientation enhances trust; a high level of self-orientation destroys trust).

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<sup>1</sup> from The Trusted Advisor, by David H. Maister, Charles H. Green, Robert M. Galford, Free Press, 2000.

Two of these factors are largely rational in nature—credibility and reliability. They are assessed through things like accreditation, references, track records and credentials. The other two—intimacy and self-orientation—have largely to do with non-rational aspects. They are assessed experientially, based on things like ease of communication, a sense of shared understanding, or an ability to see perspectives.

Sales that are largely rational in nature should focus heavily on credibility and reliability. Sales that have more non-rational issues at stake should put more emphasis on intimacy and self-orientation.

Table 1 assesses several characteristics of professional services sales against the two kinds of trust component. It suggests that the non-rational trust components are uniformly critical to many characteristics of the professional services sale.

*The single most common failing in the selling of professional services is the overemphasis of credibility and reliability at the expense of deepening intimacy and reducing self-orientation.*

**Table 1. Sale Characteristics by Trust Component**

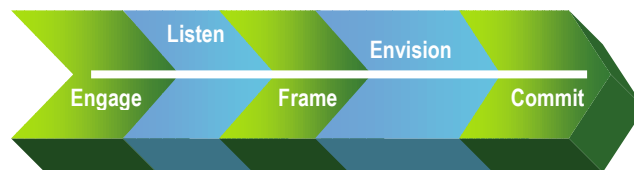
<b>Components of Trust &gt;&gt;&gt;&gt;</b>	<b><u>Rational:</u> Credibility, Reliability</b>	<b><u>Non-rational:</u> Intimacy, low Self-Orientation</b>
Component's importance given:		
-highly complex sales process	Low	High
-problem definition shifting throughout sale	Low	High
-seller has highly specialized expertise	High	High
-high level of personal risk to the buyer	Low	High
-high level of uncertainty of benefit to buyer	High	High
-highly complex product or service offering	Low	High

The Industrial Sales Paradigm stresses the rational components. Many professional services firms still share this paradigm, and the single most common failing in the selling of professional services is the overemphasis of the rational components of trust at the expense of the non-rational components of trust.

### ***The Process of Trust Creation***

How does trust develop in sales? Figure 3 shows the five-step process.

**Figure 3. Trust Development Process (ELFEC)<sup>2</sup>**



<sup>2</sup> Ibid

**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; listen at three levels--get the data, affirm the importance of that data to the client, and demonstrate you recognize it; earn the right to engage in a true dialogue.

**Frame** the true root issue, without the language of blame, via caveats, problem statements and hypotheses; pursue radical truth-telling in socially acceptable terms; reduce risk by taking risks—articulate a point of view; create by giving away.

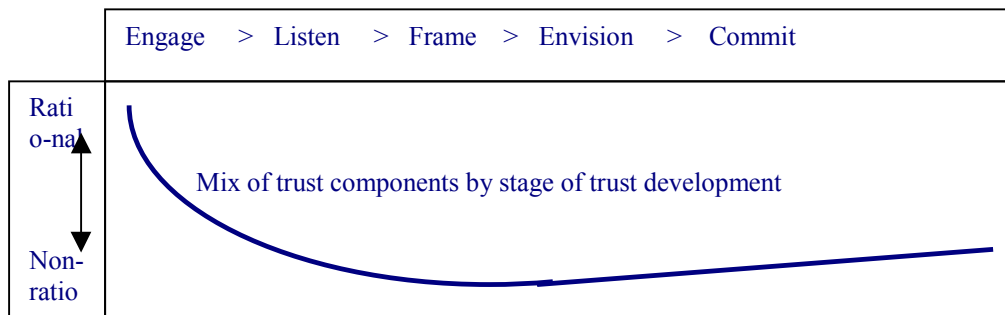
**Envision** an alternative reality, including win-win specific descriptions of outcomes and results, including emotional and political states; clarify benefits—make clear what's at stake; be tangible about future states.

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

The model will work for purely rational sales, but its power lies in integrating non-rational elements—fears, self-doubts, politics, dysfunctional relationships, and so on. The underscored words give some flavor of the non-rational component. (A fuller description of the model includes a set of mindsets, techniques and tools).

At the beginning of the process, credibility and reliability—the rational skills—are key. It is in the middle three steps—listen, frame, envision—that non-rational elements become critical. Trust-based selling thus puts more emphasis on the middle three steps—those critical to building the non-rational trust components so key to professional services sales. These same three middle steps—Listen, Frame and Envision—also describe the professional services delivery process.

**Table 1. Trust Creation Process: Effect on Trust Equation Components**



### **Linking Sales and Delivery**

Most firms sell by describing now what it will feel like to work together in the future. They focus on qualifications, credibility, references, degrees and expertise. This is counter-productive. For abstract and high risk services, there is no substitute for sampling the real thing—real-time work on a real issue by real people.



This is done best by beginning delivery during the sales process. The middle three steps of the trust model—listen, frame, envision—are in essence how professionals deliver. They engage in an iterative process of needs assessment, problem definition, and exploration of implications. An immediate benefit of putting trust creation at the heart of a sales model is its intuitive familiarity to consultative professionals from their delivery work. Done properly, this process transcends “win-win” labels to become truly collaborative. And it is in this process that trust grows.

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There is a welcome and comforting message here for services professionals. The critical sales talents are ones the professional is already familiar with. The trick is not to adopt new sales skills, but to adapt existing delivery skills. The best selling is doing.

### ***Trust-Based Selling in Action***

Personal interaction is at the heart of selling professional services. While both the buying process and the selling process contain activities outside that interaction, the success or failure of most sales depends on what happens in person. That is where trust-based selling focuses. It uses principles, mindsets, and tools. These are described in more detail elsewhere—following are summaries.

Trust-based selling is based on three principles:

1. Focus on the client—client focus is a self-willed psychological state;
2. Maximize truth—take risks to advance the relationship, have a point of view;
3. Go beyond win-win to true collaboration.

In addition to the three principles, trust-based selling uses seven mindsets:

1. Take early personal risks to reduce systemic business risk
2. Dare to be great—assume the optimum is possible
3. Excellent selling resembles excellent delivery
4. Problem definition drives problem solution
5. Envision a better reality—paint detailed pictures of end-states and benefits
6. We not me—always assume goal consonance

#### **Sample Mindset—“Excellent Selling Resembles Excellent Delivery.”**

For all the reasons discussed in this article, the temptation in a selling situation is to stress credentials and focus on the rational. That temptation is exactly wrong. The challenge is to focus on issues, including non-rational ones. That means being comfortable with saying you don’t know, being willing to articulate a point of view on the spot, and being willing to ask emotionally difficult questions.

One way to do that is to cultivate a mindset of operating in delivery mode. This can be done by acting “as if” the assignment were already sold, focusing on what must be done.

Finally, trust-based selling uses **thirteen tools**:

1. Offer up a point of view about issues, and about options, that galvanizes reactions
2. Tell more truth by Naming It and Claiming It—radical truth-telling in socially acceptable terms—eschew avoidance
3. Lead by example; be candid about your own zero-base of knowledge
4. Lead options discussions not by asking “why,” but “why not?”
5. When you’re not sure, give hypotheses instead of hedging; advance the cause
6. To show what it’s like to work together, work on real issues together
7. Don’t go to action steps before exploring in great detail the potential end-state benefits
8. Value creation lies in improving the problem statement, not in giving answers
9. When problems are sticky, seek the higher level problem statement
10. Eliminate ego; frame without blame
11. Use 3-level listening to earn the right to move to suggestions—get the data, get the significance, and acknowledge both
12. At all times use a shared agenda to begin meetings, calls, conferences and interactions
13. Use the language of trust—avoid the verb “to be” and stick to your own observations.

**Sample Tool—Name It and Claim It: Radical Truth-telling in Socially Acceptable Terms.**

This tool is useful for discussing difficult situations, elephant-in-the-parlor issues, and emotionally charged discussions of points of view. Its precise formulation is “list as many caveats as are necessary to slightly overcompensate for the statement, then make the statement in completely blame-free terms.”

For example, “I may be misreading something here, and forgive me for being direct, but I sensed you were unconvinced by that last discussion; is that right?”

### **Trust-Based Selling: Differing Emphases**

Trust-based selling doesn't directly contradict of many traditional industry selling skills and tools--but it does rebalance emphases. Here are some.

- Problem definition refinement is more important in trust-based sales. This is because of the levels of uncertainty, and the hesitance of both parties to acknowledge it. If either client or consultant pretends they know more than they really do, they will not be trusted by the other.
- So-called "high-gain questions" are less important in trust-based sales. High-gain questions clarify implications and connections—important, but functioning mainly in the rational realm alone.
- Collaborative mindsets and skillsets are more important in trust-based sales. Success in delivery depends on cooperation, and success in sales depends on the ability to demonstrate other-orientation.
- Closing and objection-handling techniques are less important for trust-based sales. Closing is the natural outcome of a collaborative agreement on what must be done.
- Personal risk-reduction techniques are more important for trust-based sales. A talent for radical truth-telling in socially acceptable terms is what distinguishes successful professional business developers; they can ask key questions that other consultants consider "too risky."

### **Bringing Trust into the Process**

What can be done to enhance trust-based selling? Certainly professionals can be trained in the trust-based sales approach. Meantime, there are some immediate things firms can do to enhance the level of trust-based selling that happens with existing models and processes.

1. Get honest. Be candid—especially with mid-levels in the firm who are beginning to take on selling responsibility—about the psychological complexities involved. Don't pretend it's all about smarts and techniques.
2. Ask clients. Ask clients before, during and after the sales process for their input; don't force their answers to fit your questions; listen to what they say.
3. Don't jump to solutions. Outlaw use of the phrase "what if we..." until the client assures you you've fully understood the problem.
4. Revisit Listening 101. And 201. And sign up for 301.
5. Push the limits of collaboration. If you're having a client sales meeting without the client, ask yourself why.
6. Role-play. Do less rehearsing and more role-playing; it's interactive—just like trust.

Trust-based selling as a new paradigm is more tailored to the specific needs of the professional services marketplace. Good selling is too important to be left to a one-size-fits-all paradigm. The good news is, we as professionals already know much of what is necessary for successful selling through our good work on delivery. It's good for our clients, and it's a more natural process than most of us feared.



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