Tips and Tactics

Sundry Items to Be Aware Of

While this book was being written, we took note of myriad valuable ideas that were relevant but didn't have an exact fit into any particular chapter.

This appendix captures many of these for you to use as you need. As stated in the introduction, we are not endorsing any particular vendor, company, or service (unless noted). We will also update this at www.ipgtraining.com.

Technology Is a Tool, Not the Answer

Technology will become your best friend if used properly, or it will turn against you and become a foe, a real time waster, if you think it replaces excellent selling skills and can do the sales job for you. It helps you on your destination, but it is not the vehicle. Put another way, a carpenter is a better carpenter by knowing how to use the best tools available. Or a person who can fly a jet plane might be the best pilot possible, he isn't the jet he is flying.

Have Your Own Website

Not having your own website is tantamount to having a faucet without a sink or a storefront that is always closed. The water will run everywhere, and so will your sales and marketing efforts. Everything we talk about regarding lead generation, social media, marketing, etc., is intended to bring people to specific pages on your website so you can capture data (which you can use in your customer relationship management [CRM] and further lead generation), provide relevant information, and improve your rankings in organic search. There are many companies that offer incredibly inexpensive websites (and hosting). Some are even free. If you are reluctant to have your own website, make sure your LinkedIn or Facebook pages are full of useful information and testimonials about you. People want to, or will want to know who they are buying from and if they can't find information about you then they are suspect.

Have Your Own YouTube Channel

If you have videos, then setting up a channel to host them is simple. If you have videos and don't, you are missing out on free promotion, search engine optimization (SEO) gain, and showing others you are open to change. Sometimes it is about showing yourself to the world, even for validation. The first thing we do when someone sells to us is check if they have a website. The second? See how it looks, see if they have videos, and assess how modern they are. It tells me all I need to know in 60 seconds.

Remember: Technology Is Sexy

Most people are impressed when they see someone using technology effectively, and, depending upon their industry and personality, they are equally impressed with early adopters. When salespeople walked into an office with the first few iPads, prospects were impressed. It was very cool and the early adopters presented an image of people who breathe technology. The Macbook Air, the iPhone, any tablet, and big screen smart phones are all worth the investments. (Plus, they are lightweight and you can watch movies on them!) But don't go overboard—Bluetooth headphones tend to be annoying if you are with someone (not in a sales

environment) because the person doesn't know if you are speaking to her or someone else.

Run Contests

You can run contests or use gaming to bring attention to your offers. IPG has run contests to get information or reach out to new customers. Winners are awarded free training time with Jonathan or a donation to a choice of charities.

You can also run contests for your current accounts to learn from them and keep them loyal. Companies like Hotels.com and JetBlue run contests that ask participants to complete customer satisfaction surveys to qualify for a prize.

Everyone wants to win something for free, so contests are great if the prize is something people want and entering is worth giving a few minutes to.

Create Instant Appointments

In setting appointments to investigate some new technologies, we ran into timetrade.com, an automatic calendaring capability that allows you to set up meetings immediately if somebody expresses an interest in your offer. There are many other technologies and services you can use that take care of the mundane or repetitive issues so you can sell more. You may already know of some. .

Use Speech Recognition Software

Speech recognition has become much more ubiquitous, accurate, and usable in many applications. This technology will capture your voice and translate into characters that you can use in different applications such as Microsoft Word. This way you avoid wasting time by retyping everything.

Jonathan uses Dragon Naturally Speaking by Nuance to dictate short and long passages and capture important thoughts or observations. He then uses them in his teaching or in his proposals.

Take Lots of Pictures and Videos

Since you always have a camera with you via your smartphone, you can capture great moments to use in PowerPoints, proposals, blogs, etc. This goes a long way toward personalizing presentations and is much more impressive than using stock images or graphics, as most people do. You can also include video if your camera allows, or if you carry around a video camera. Jonathan uses the Flip Camera that Cisco recently wrote off. He captures conversations that can be repurposed for training, or included in proposals and marketing.

Martin's phone has an HD camera. He also uses a studio, a videocamera, a tablet, screen capture, and webconferencing. You never know what footage is useful. Start by profiling yourself and team, and do mini interviews. Let people see beyond the product.

Search "Best . . ."

Type in Best [whatever] into your favorite search engine to get the best blogs or websites for a subject. You will get a lot of ads but you will also a lot of information. For example, Jonathan wanted to find the sales blogs that my customers and prospects follow, so he typed in "best sales blogs" and found the top 40 blogs that people use. Many were competitors so now he can follow them, learn from them, and keep my eye on them.

Turn Off Your Technology

Experiment with turning technology off for a while so you can focus on what you need to get done. For example, I (Jonathan) will turn off my e-mail and phone when I am doing one of my S.M.A.R.T. (specific – measurable – aligned/agreed upon – realistic – timed) priorities. I also turn it off just to give my whole system a rest. This gives me a perspective and appreciation of what technology can and cannot do for me and makes me a better salesperson.

Know How to Use Social Media

If you don't you will become a dinosaur and your business will become extinct. Here are some examples among many of how to use social media properly:

- 13 Brands Using LinkedIn Company Page Features the Right Way – Hubspot.com

- How to Build a Facebook Timeline for Brands — It's All About Revenue: The Revenue Marketing Blog – Eloqua.com

- Lead Nurturing for After the Sales Cycle — It's All About Revenue: The Revenue Marketing Blog – Eloqua.com

- You need to limit social media to specific times in a day and to specific subjects that are most relevant to your business objectives. Otherwise, *you will get nothing done*.

Employ Location-Based Routing

Location-based routing gives you the ability to adjust who calls you and can get to you based on what you are doing. This is a very productive tool because you can screen callers. For example, if you are going to a meeting you can take in texts but not calls. If you are running a promo, you can take calls only from interested prospects. If you are playing or watching basketball, you can take calls only from your friends.

Survey Your Customers

Surveys are a great tool to get input from your customers, prospects, and social networks on things you are doing or want to do. You can use them to see how satisfied people are with your services. When I (Jonathan) first heard about NetPromoter Score I was curious what my clients would say about me so I sent a survey to my LinkedIn users. Figure A-1 shows what they said (which made us very happy).

Figure A-1. A sample testimonial.

You can also use surveys to see which programs or services people like best, get ideas on which services to create, use as a post-sale survey to see how they feel about your offer, and get in touch with old customers or customers who have gone with another vendor.

Register Many Domain Names

Domain names are very affordable and can be bought and sold easily. The domain sex.com just sold for $14 million. We have several domain names that reflect and capture ideas we have or business we are considering. For example, IPG owns jonlondon.com, davidvsgoliathselling.com, sales-advisor.com, and many others. These names are all ideas of services and products we will be selling so we want to "own" the domain name. We suggest you lock up any names relevant to yourself and your business.

Get Anywhere Anytime Connectivity

Salespeople need mobility to connect to any person, service, software or data you need, regardless of where you are. One of Jonathan's favorite memories was watching the New York Yankees play in the World Series from a hotel lobby in Copenhagen at 3:00 a.m. while he was also listening to a webconference that he had recorded. Get your own mobile hotspot or

use your smartphone to do the same. You never want to be disconnected unless you decide you want to be.

Getting to People with Technology

How else can you reach people with nontraditional technology? Here's what we use in prospecting: e-vites, birthday cards, VYou.com, invites to webinars, and video e-mails. Adobe Photoshop or similar products allow you to create unique marketing materials, brochures, fliers, cards, among other things, that can help you stand out in a good way. We also use Camtasia.com to record myself doing a demo or overlaying my image into a PowerPoint. They work well if you are saying something relevant and intelligent.

Use Outlook Fully

Most businesspeople have Microsoft Outlook on one of their computers. It's a great tool for salespeople. You can:

- Send a calendar invitation to people who sometimes will accept even when you haven't had much, if any, contact with them. There is a high risk of the appointment being canceled, of course, but it's worth the effort.

- Schedule follow-up e-mails so they go out on a specific day and time.

- Automate the sending of e-mails at night or on the weekend as long as the computer is turned on and online.

- Please use your out of office message! It's frustrating if people do not know where they stand.

Virtual Assistants

Because technology allows information to be shared and makes communication much easier, an entire industry of virtual assistants—people who work for you in other countries—can do most if not all of your

administrative work at a significantly reduced cost. The book *The 4-Hour Work Week* by Timothy Ferriss does an excellent job explaining how to take advantage of these services

Appoint a Technology Maven

Create a position in your company responsible for staying on top of all existing and emerging technologies that can help you sell. Jonathan sets alerts to send him technology updates automatically. He also has an informal group of people he collaborates with to share their best ideas and uses of technology. He has joined different groups on LinkedIn to keep him up to date with the technologies that matter most to him. These include Technology-Enabled Sales and Marketing (TeSM); Cloud Computing, SaaS, and Virtualization; and WHU Web-Hosting Experts Group.

Send Visual Literature or Information about Your Company

Create your own videos and URLs instead of, or in addition to, traditional literature. I (Jonathan) have created videos of subjects that people can review or I can use to prospect with. If you have a Macbook Pro, you can use Photo Booth or iMovie to create videos or images.

Another amazing technology is Brainshark.com. It is free for certain services and lets you create interesting audio/video slides using PowerPoint and your phone. It has been around quite a while and has evolved from an expensive service to an SaaS cloud service.

Use SaaS

The beautiful thing about much of this technology is its availability as SaaS (software as a service) so you can use it with an individual license.

In addition, many providers offer their services for free in order to create a base of users and attract advertisers. Table A-1 provides some examples of items available at no charge.

Table A-1. Software Services Available Free of Charge

Item	Service
CRM	Freecrm, Zohocrm, Civicrm, Salesforce.com Free, With social CRM solutions such as Nimble or Reachable, assigned territories will be giving way to social proximity, in which leads are assigned to salespeople who have the best social connection with the prospect.
Lists/Database	Jigsaw, sohoost.com, LinkedIn, Facebook
Lead management software	www.capterra.com/lead-management-software (too many to mention)
Collaboration tools	15 Free from PC World www.pcworld.com/businesscenter/article/200835/15_free_ online_collaboration_tools_for_business.html
Audio conferencing	Freecaudioonferencing.com, freeconference.com, freeconferenceusa.com
Videoconferencing	Skype, Google, others
Word processing, spreadsheets	Google Docs, Openoffice
Screen capture	Camstudio.com, camtasia.com
Animation (from http://download.cnet.com/ mac/animation-software)	Stykz, Poser/DAZ Studio 3D, Singleframer, Lego Digital Designer, Barcode, Animoto
Radio	Internet-radio.com, blogtalkradio.com
Apps	Thousands from iTunes or Android
Presentation (Google search of free slide software presentation)	31,700,000 including iMeet, slideshare.com (trial), smilebox.com, openoffice.org's Impress, brainshark.com
Cloud services	Free (type the term into any search engine)
Photo or image editing	Free (type these words into your search engine to see what comes up)

Some technology does cost, but it is affordable (Table A-2).

Table A-2. Technology Available for Purchase

Other Technology	Current Price
Smart Phone	$99 or less
iPad	$399 (less if buy an older version or a non-Apple device)
Bluetooth Headset for Driving	$29
4G Mobile Hot Spot	$29–$59/month
Any technology	Type in whatever technology you want to use into a search engine to see if it is available in a free version.

Be a Virtual Warrior

Truth is, many people don't need an office. There are so many places that you can work from because they give you access to the Internet, including Starbuck's, Panera, a customer's office, hotels, and even public spaces in cities that provide free wi-fi. Martin and Jonathan have pulled off the side of a road to find a nice hotel lobby to do their work with great success. If you are an owner, manager or boss and you insist on having your people in the office, you should reconsider.

Because some of these places are noisy, you should invest in a noise reduction headset (Bose or others) so that when you talk on the phone, the sound is good. Jonathan joined the Terrace Club (www.terraceclub.com), which is an organization that provides excellent meeting facilities for virtual warriors. The accommodations are very nice and the service and food are excellent so you can also meet customers and prospects there and make a good impression.

Use the Phone

Too many people use e-mail in situations in which they should be speaking directly to people. Two vivid examples are negotiating and dealing with

money. Jonathan received an e-mail from the assistant of a vendor/owner he does business with. The vendor believed he was owed money. After asking for an invoice supporting the request, he received another e-mail stating it was verbal agreement. Jonathan wanted to maintain a good relationship so he called his direct contact to discuss, and they resolved it quickly.

Negotiation is too emotional a subject to deal with via e-mail. Not only should you pick up the phone, but you should actually meet in person or have some video presence if that's not possible.

Create Your Own Sales Process

Use Table A-3 to align the measurements, skills, knowledge, resources, technology, and tools you need for your own success. You can also go to www.ipgtraining.com/forms to download the actual form.

Table A-3. Sample sales process aligning skills, resources, and technology

Sample Sales Process								
	1- Territory Identification	2- Gain Access to Power/ Prospecting	3- Discover, Qualify and Influence	4- Confirm Fit and Decide to Engage	5- Propose, Present and/or Demonstrate	6- Work	7- Negotiate	8- Close
Objective of Sales Step								
Metrics								
Skills								
Probability to Close								
Sales Tools								
Generic & industry								
Technology								

Create Playbooks

You can do this for yourself or there are companies that can capture the best practices for you throughout all stages of the sales process and help you create sales playbooks. Figure A-2 shows just some of what Qvidian playbooks have to offer. Other companies, such as iDashboards and XSalerator can help you analyze the effectiveness of your sales approach.

Figure A-2. Qvidian playbooks.

A Sample 12-Hour Sales Day

Table A-4 shows how one of our days recently went. Use the structure of the table to track your own time—you'll be amazed at how easy it is to waste time. (Note: the amount for each item will vary based on your reality.) If you can do all of this less time, fantastic!

Table A-4. Sample 1-Day Schedule

Time	Item	Notes
7:00–8:00 a.m.	Take client or prospect out to breakfast. Work business in Europe or Asia if appropriate via video.	Best time to entertain since people aren't busy and it is less expensive. If no breakfast or international responsibilities, check e-mails and take care of administrative details. Work with your virtual assistant if you have one.
8:00–8:45	Review social media, Google alerts, LinkedIn, RSS feeds; check e-mail.	You can do this daily or weekly depending on volume of activity.
8:45– 9:30	Prospect.	Use social media, phone, lead generation software or e-mail.
9:30–12:00 p.m.	Meet with prospects or clients.	Use collaboration technology when appropriate. Use smartphone while on road to make calls or check e-mail.
12:00–1:00	Have lunch and check e-mail.	If you have to; otherwise take client or prospects out.
1:00–4:45	Meet with prospects or clients.	If no meetings, prospect or work on strategic deals. Check e-mail at some point.
4:45–6:00	Prospect.	If you have done your prospecting and have enough meetings, work, on other priorities, generate proposals, work on presentations, etc. Attend internal meetings.
6:00–7:00	Finish to-dos	Use technology as much as you can to eliminate unnecessary busy-work and to complete mundane tasks. Enter info into CRM.

Use E-mail Productively

E-mail is undoubtedly one of the best tools for today's salesperson. The problem is that it has become so important and predominant that it becomes disruptive, controls people's lives (work and personal) and attention, and quite often prevents them from being more productive than they are.

According to an *Inc.* news article from March 2, 2011:[1]

> *Workers in small and medium-sized businesses spend half the work day on "necessary, yet unproductive tasks, including routine communications and filtering incoming information and correspondence," says a report from telephony company Fonality and research firm Webtorials. (No word, though, on how much of that e-mail is personal.)*

A report by the Radicati Group projects a steady growth rate in the number of business e-mails being sent and received per day (Table A-5). This does not include personal e-mails:

Table A-5. Business e-mails sent/received per user/day[2]

Average number of emails	2011	2012	2013	2014	2015
Sent	33	35	37	39	41
Received	72	75	78	81	84
Average emails per user/day	105	110	115	120	125

Depending on your industry and position, this could be more or less. E-mail is used as the primary way for people to communicate with each other to

[1] Courtney Rubin, "Study: Employees Are Unproductive Half the Day," Inc., March 2, 2011, www.inc.com/news/articles/201103/workers-spend-half-day-being-unproductive.html.

[2] Sara Radicati, "Email Statistics Report, 2011-2015," The Radicati Group, Inc., May 2011, www.radicati.com/wp/wp-content/uploads/2011/05/Email-Statistics-Report-2011-2015-Executive-Summary.pdf.

request information, get updates, and keep people aware of things they are doing (either directly or with a cc to others). Much e-mail is really a CYA (cover your ass) action. You send a message to more people than necessary so you feel you are protected politically. It is also a big time waster because the people receiving these also feel they need to read them and often respond for the same political reasons.

Organizations have become habituated to expecting immediate responses to e-mails, especially from a boss to a subordinate. In turn, there is pressure to respond to these e-mails ASAP or the boss could get angry. This type of environment is incredibly disruptive and makes it difficult to be proactive and strategic—the workplace becomes an "interrupt driven" environment. Salespeople are always on their computers or smartphones reacting to e-mails and don't feel comfortable being away from e-mail for any length of time. Please note that people are also spending time with instant messages and personal e-mail.

A Google search for "manage e-mail more effectively" showed 29,500 hits. Here are some ideas on how to better handle your e-mail:

- Create some internal rules in your company regarding what needs to be responded to immediately and what does not.

- Define when a "cc" is necessary or not so people don't waste time reading or responding to these e-mails.

- Turn your e-mail off when you are working on your priorities.

- Instead of checking e-mail all the time, create specific times in your calendar when you will (every hour for 10 minutes or beginning of day, lunchtime, and end of day).

- Delegate and assign accountability to others for certain tasks so you don't have to everything.

- Have your e-mail signature tell customers whom to call for different services.

- Use the filters on your e-mail system to highlight the most critical messages.

- Handle e-mail like people used to handle paper. Have a folder to read/do later/delegate.

- Stop cc'ing everybody yourself so you don't have to respond to their cc's.

- Be diligent and disciplined about whatever system you use so you are controlling it.

- If you are a manager, stop sending panic emergency e-mails for account or forecast updates. Have a regularly scheduled time to do so with your team.

- Ignore your e-mail when you are executing your priorities.

My (Jonathan's) last year at PictureTel was very strenuous because of the numbers we were expected to generate in a very competitive environment. I took a 10-day vacation before the fourth quarter to make sure I was at my best. I left voicemail and e-mail notifications that I was not going to answer or respond to any message and whom to reach out to otherwise. When I got back from my vacation my voicemail box was full (100 voicemails) and I think I had more than 500 e-mails (that would be 1,500 today). I didn't want to deal with this so I erased everything, and, to this day, I don't know of one negative repercussion of doing so. I realized I was creating my own "e-mail jail" and stopped cc'ing everyone and checking e-mail all the time. It was the best and biggest productivity boost and has served me well throughout my career.

What about Facebook, LinkedIn, Twitter, and other social media? You should spend no time on these during work if they have nothing to do with your job. Otherwise, use them as part of your prospecting and business branding efforts. Activate these as priorities so you use them at specific times with a specific purpose.

Employ Electronic Signatures

We use this capability for many of the documents we send for our business. The most common uses include sales contracts, vendor agreements, non-disclosure agreements, legal documents, and more. Life is now too short to

wait around for the postal service to deliver important legal documents to your door.

Sell in Your Signature

Use call-to-action URLs and links in your signature. If you have video testimonials, write a short narrative and put in the link. These work better than anything. If you don't have any, then record some!

A Great Quote to Improve Your Use of Technology

> *"Technology is only as good as what you use it for, think about the customer first, then what is best to sell with or for them to use."*

—Jonathan London, Author, Lover of sales and technology

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