

# SALES AND SERVICE Excellence

THE MAGAZINE OF TEAM LEADERSHIP

FEBRUARY 2011

**People  
Skills**

**Customer  
Engagement**

**Brainstorming  
Establish a Framework**

**Josh Linkner  
Consultant**



*"Sales and Service Excellence is a phenomenal resource for sales professionals who want to grow and achieve more in their careers."*

—TOM HOPKINS, AMERICA'S #1 SALES TRAINER

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nizational objectives. People do not work with devotion or expend energy on something they do not believe in or agree with. Clarity and uniformity of personal and organizational values and principles are essential for active employee engagement. Many people are keen to contribute more at work, but the behavior of their managers and the culture actively discourages them from doing so. There is vast untapped *performance potential* that could drive better financial results.

Encourage managers and employees to formulate their personal brand and to reflect about the balance between their personal brand and the corporate brand. Introduce a *branding meeting* between line-managers and their reports. This is a periodical, informal, voluntary, and confidential meeting of one hour to explore the employee's personal brand and the fit with the corporate brand. Hold the meeting monthly. The line-manager or supervisor plays a crucial role in employee well-being and engagement. During the alignment process, *the manager should act as a trusted and informal coach* and provide social support by being a good listener, providing help, and being someone the employee can rely on. This meeting will clarify if your personal brand and those of your company are in harmony—and where they are in conflict.

**Don't expect a perfect match or alignment**, but the more alignment the better. If your brand doesn't align with the corporate brand, find a job where there is a better fit.

### Authentic PL Branding (PLB)

Building an *authentic PLB* is a process. It starts with determining *who you are at your core*—based on your dream, life philosophy, values, identity, self-knowledge, and self-awareness. Your PLB should be *authentic* and emerge from your search for your identity and meaning in life. It's about getting clear on what you want, fixing it in your mind, giving it your positive energy, doing what you love, and developing yourself continuously. It should always reflect your character, and be built on your values, strengths, uniqueness, and genius. If you are branded in this way you'll create a life that is fulfilling and attract the people and opportunities that are a perfect fit for you.

*Authentic PLB helps define who you are*, what you stand for, and what makes you unique, special, and different. You become your own brand and the CEO of your life. Everyone has a personal brand, but most people are not aware of this and do not manage this strategically, consistently, and effectively. You should take control of your brand and the message it sends and affect how others perceive you. This will help you

to actively grow and distinguish yourself.

*Having an authentic PLB* stimulates positive perceptions about the values and qualities you stand for; tells others who you are, what you do, what makes you different, how you create value for them, and what they can expect when they deal with you; influences how others perceive you; creates expectations in the mind of others of what they'll get when they work with you; creates an identity around you that makes it easier for people to remember who you are; gets your prospects to see you as *the only solution to their problem*; puts you above the competition and makes you unique and better than competitors.

**PLB is a key to business development.**

People want to do business with people they know or feel some sort of connection. If you are a familiar and consistent presence, they'll have the sense that they know you and be more receptive to doing business with you.

*Traditional personal branding* focuses on personal marketing—building a name for yourself, and then showcasing what sets you apart.

*Authentic PLB* focuses on *building a trusted image of yourself* that you project in all you do. It's about your values, beliefs, dream, and genius—combined with powerful tools to deliver peak performance and to create a basis for trustworthiness, credibility, and personal charisma. By connecting your unique gifts, purpose, and dreams, you open yourself up to greater success. Hence, you place more emphasis on personal development, growth, empowerment, and the human side of branding. Again, it starts with determining *who you are at your core authentic self*—based on your life philosophy, dream, vision, mission, values, key roles, identity, self-knowledge, self-awareness, self-responsibility, positive attributes, and self-management—not *inventing a brand* for public perception and then *selling it*.

*Authentic PLB is related to eight basic criteria:* **Authenticity:** be your own brand. **Integrity:** adhere to the moral and behavioral code set by your vision. **Consistency:** be consistent in your behavior. **Specialization:** be precise, concentrated on a single core talent or unique skill. **Distinctiveness:** distinguish yourself based on your brand. **Visibility:** broadcast it often until it's embedded in the minds of the audience. **Persistence:** your brand needs time to grow. **Performance:** if you don't perform, and improve yourself, your branding will only be cosmetic.

When you have a PLB (and *act accordingly*), you distinguish yourself. **SSE**

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**ACTION: Create an authentic PLB.**



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# Customer Engagement

*First you need to engage employees.*



by Sheila E. Murphy

THERE IS NO SHORTAGE OF knowledge, models, data, skills or philosophy supporting the importance of *customer and employee engagement*. Engaged employees improve your odds of earning and keeping engaged customers, and customer advocates make firms more valuable.

## Obstacles to Change

One or more of five obstacles often prevent you from boosting engagement:

**1. The distance between employees and the final products and services that the company provides customers.** The layers of function that separate development and the final, ready-for-delivery services easily distract from the final goal. R&D staff may operate in a dimension far from the finished product. Planned enhancements to offerings must make sense from the client view and be understood by staff in product design from concept through delivery. The *service impact* of any product or service must be *linked directly* to the problem that the product solves for clients.

**2. The absence of employee contact with real customers who work with the company.** Organizations often restrict direct customer contact to front-line service providers, who develop fluency in customer interaction. These staff members often operate at a distance from financial professionals and other support areas. A customer advocacy perspective may exist in certain front-line staff, but that knowledge may not be heard by others. The opportunity for information sharing is clear.

**3. Complicated processes that obscure the direct service equation.** Employees are frequently busy thinking through and around bureaucratic complications, at the expense of addressing the simplest, most powerful service relationship. Central office staff can lose sight of *what* customers are receiving, how they perceive that service, and changes that are needed. In financial services, for example, I find that highly skilled individuals who meet with the customer perceive their role as *navigators* through the maze of obstacles that interfere with service—such as delays in delivery and repeated requests for client information. Such obstacles reveal

a chance to *make the relationship about the customer*, not the provider.

**4. The absence of a clear and inspiring service message by the leader.** Many leaders neglect to design and deliver a simple, powerful message that articulates the customer-centric view. In my work, I see the differences in employee performance between organizations whose leaders synthesize a clear, simply stated, memorable service goal and those that do not. Leaders who activate their power to direct committed service facilitate professionalism, leading to outstanding customer service.

**5. Systems that support customer responsiveness.** Firms that build around a commitment to service gain considerable publicity. Nordstrom's and Zappos



in the retail sector are noted for unusual and attention-capturing service commitments, all focused around leaders who expect service professionals to take charge of the customer relationship and make service the only reality.

## Take Six Steps

Take these *six action steps* to create employee and customer engagement:

**1. Establish a one-question culture.** Make any investment, expenditure, or change subject to a single question: *How will this affect the customer experience?* Consider only actions that generate a *positive* response—nothing neutral or negative. Ask, “Who benefits from what we are discussing?”

**2. Establish ownership of the customer relationship for each account.** Each account must be guided by *one professional*, to whom others hold themselves accountable. The service leader is attuned to the customer's needs and guides all support departments to ensure consistently high-quality service.

**3. Structure the culture around customer relationship management and**

**appreciation.** Most hierarchies reward high-ranking leaders and managers. On a lower rung are the service and sales staff, who are dispatched to meet with customers. Often, they must approach their fellow employees and company officers hat-in-hand, asking the favor of performance on behalf of the customer. In organizations that utilize an outside sales force, these professionals are often treated like outside customer advocates. *Reverse this system*, placing the *customer relationship* at the core of what the company does, and strengthening each relationship with a full support team. This need not require more staff, but necessitates *redeploying individuals to play a key role in changing the culture*. Spreading customer accountability results in more engaged employees and customers.

**4. Appoint a C-suite professional in charge of customer experience.** All areas that directly touch the customer should answer to this professional: customer service, implementation, relationship managers, business development, and sales and marketing. This enables you to *respond to customers more quickly and consistently*. Having a *senior officer* makes a statement about values: *Nothing is more important than the customer*.

**5. Design incentives that clearly benefit individual and team performers.** Only firms with *the right incentives* have *fully engaged* employees. The compensation system and incentive plan convey a *clear value* that the company places on *individual achievement*. If this system is flawed, and excuses are offered, employees will resent their leaders. The incentive system must be fair, inspiring, and provide hope for all performers.

**6. Recognize, reward, and communicate widely the successes of employees who build customer loyalty and advocacy.** Clearly explain to the C-suite and to employees your belief in and support of *customer service drivers* and their results. Cite examples of what is unusual, inspiring, and worthy of replication. Each *example of excellence* in service contributes to new service designs.

**Direct all efforts toward maintaining customer loyalty.** Integrate key service questions: *What keeps our customer coming back? Is it rational? Emotional? How close are we to losing each key customer? What are we doing about it?*

You need to know what drives customers in the door, and fastens their attention on the offerings designed to enhance their lives or their business. **SSE**

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**ACTION: Implement these six steps.**

# Kill Productivity

Here are four sure-fire ways to do it.



by Rebecca Schalm

**D**ECLINING PRODUCTIVITY IS a serious concern since the more it costs us to produce something, the less competitive we are in the marketplace—and that leads to fewer jobs, diminished earning power, and a lower standard of living.

The usual explanations or excuses for declining productivity often point to low investment in tools, technology, and innovation. Rarely mentioned are factors such as how we hire, deploy, and develop people—but I would argue that these factors can significantly increase or decrease productivity.

Let's look at four sure-fire ways you too can reduce productivity:

**1. Settle for less than you need.** Is your business an under-achiever in recruiting and hiring top talent? Few organizations undertake an *international search* for top talent below the C-suite; in fact, such a search may be greeted with skepticism. For example, when Alberta Health hired an Australian as CEO, his appointment was met with the reaction, "Don't we have anyone local who is qualified for the job?" If there is a scarcity of local talent, Hiring the best may mean looking far and wide. *From a productivity perspective, hiring someone who is fully capable and can hit the ground running is a great advantage.*

**2. Under-value expertise.** Many firms are chock-full of people doing jobs for which they are not well trained or adequately prepared. Companies are awash in people who refer to themselves as *generalists*. This may mean they've moved around to fill a hole or satisfy an immediate need. The downside is that they often lack the perspective and expertise to take a function to the next level. One victim of this de-valuing of expertise is Human Resources. There is an often erroneous belief that understanding and relating to the business is more important than having the background and possessing the expertise required to actually run it. The result is a dearth of capability across an entire function. *Leading companies know that it is more expedient and efficient to put real experts in roles that demand real expertise.*

**3. Move people around often for their development.** One rationale for moving people across functions is that *it's good*

*for their development.* Yes, gaining cross-functional experience is a *growth opp* for leaders, and vital for those being groomed to assume major roles. The casualty in these moves, however, is often the team or function. It serves as a *training ground for the inexperienced*, a place where *modest ambitions are expected and generally achieved.* Only those people whose development is critical to the future should be moved into stretch assignments outside of their areas of expertise. The productivity of people on a steep learning curve will always be limited, so make these decisions cautiously. *Balance what is good for the business with what is good for any one individual's development.*

**4. Rotate people every 12 to 18 months.** Some firms believe effective leadership development means rapidly cycling people through roles. Find a

problem, assign a *high potential* to solve it, and then move them on. There are at least three problems with this strategy: 1) It takes people on average three years before they are a good ROI (18 months to learn the job, and 18 months to get good at it); 2) Emerging leaders in this scenario *never live with the results of their decisions* (hence, their learning cycle is incomplete and their growth stunted); and 3) Every time you move someone new into a role, *they undo most of what their predecessor put in place*, further eroding team productivity.

Your beliefs and practices around hiring, developing, and deploying talent have a huge impact on productivity. Be smarter around people practices and decisions to boost the bottom line. **SSE**

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**ACTION: Boost your talent productivity.**

## MANAGEMENT/ASSISTANTS

# Who to Promote?

What to look for in an assistant.



by Norm Spitzig

**G**REAT COMPANIES ARE populated by great employees. The best general managers (GMs) exercise the vision, wisdom, and courage to identify, attract, hire, and mentor great assistants.

Most GMs spend *too much time on tasks that could and should be handled by assistants.* By hiring and mentoring the right assistants, you'll have more time to do strategic thinking. Your business will run more efficiently and profitably—and successors will be in place.

What are the attributes to look for in assistants?

- **Complementary skills.** Good assistants are not clones of their GMs; they bring new and different talents to the senior managerial mix. A "low tech" GM would be well-served to hire someone who knows high-tech tools.

- **Practical experience.** Beyond formal, industry-specific education, good assistants need *relevant hands-on experience* before they are ready to function effectively. Ideally, this practical experience can and should be garnered in a variety of positions within the company or another company in the industry.

- **Loyalty.** Good assistants are *loyal* to their boss, the GM. Office politics might make for a good TV sit-com, but they make for a bad assistant manager.

*When the boss looks good, everyone looks good.* Effective assistants trust in the experience and knowledge of their bosses, and earn their respect.

- **Good work ethic.** Top assistants put in the time to make the business a success. Nine-to-fivers need not apply. Filmmaker John Frankenheimer once said, "The importance of hard-working assistants can't be overemphasized."

- **Desire to be a GM someday.** Today's assistant manager is potentially *tomorrow's GM.* Someone who is content *just to be an assistant* is not someone who most GMs want on their team. (Yes, there are exceptions.)

- **Passion and enthusiasm for the industry.** Successful managers genuinely love their work and their industry. It is in their blood.

- **Creativity.** Newer assistant managers tend to be too *rules-oriented* and *rigid.* Over time, most assistants gain industry-specific sense (especially when they work for a supportive and nurturing GM), and make creative applications.

- **An interesting person.** They are not one-dimensional. They have fulfilling personal lives and *myriad interests* and activities. Nerds seldom become GMs. Top assistant managers make work more enjoyable—and when people love their work, productivity, customer satisfaction, and profits all increase. So, locate, attract, hire and mentor the right assistant manager. **SSE**

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**ACTION: Hire and mentor a top assistant.**

# First Contact Management

*Bridging the gap from marketing to sales.*



by Jenny Vance

**T**OO OFTEN MARKETING hands great leads to Sales, but *the deal never happens*. So, how can you get value out of *every lead and prospecting call* and bridge the gap between Marketing and Sales? Moving leads from marketing into the sales pipeline is challenging. Marketing interactions today are mostly digital. Interactions from email messages, Web pages, forms, downloads and Webinars provides insight into a prospect's needs and interests, but *this insight is mostly inferred from behaviors that marketers observe*.

This challenges marketers, who hope to see *leads* they generate grow into *sales*. Marketing spends time and money generating leads through digital marketing applications that Sales rejects because the leads are not *qualified*, or Sales fails to follow up on leads systematically.

How can you take your *understanding of prospects* to a new level and build a *personal relationship* with them? The answer lies in the *first sales contact*—the *first interaction* with a prospect, and the *first chance to get direct answers to specific questions*. But, if sales reps fail to reach the lead, no information is gathered.

Only *one out of seven* sales teams follow up and reach at least 75 percent of the leads. It's easy to blame the quality of the leads, but marketers are handing over more qualified contacts as they adopt more sophisticated lead screening, scoring, and nurturing techniques.

**More likely, the problem is a failure at first contact.** Unless sales teams reach out in a *systematic, determined fashion*, they'll miss many possible connections. Trying *one phone call* and quitting does not count as a systematic, determined approach, yet that's often the standard.

Making the connection and getting the right answers helps you put each lead on its proper path, ensuring that sales and marketing resources are deployed productively. And, *the first contact process can provide more market insight from live prospect dialogue than any other marketing or sales process*. The information gathered provides important insight back to digital marketing (and the C-suite), to the sales process. So, learn to turn *online interactions*—from email, Web pages, forms, downloads

and Webinars—into *personal relationships* using processes that can be tested in advance and offer little risk.

You need the *right processes and systems* to do *first contact management (FCM)* right, and assess the success of your prospecting and lead generation efforts.

## Doing It Right

Effective FCM meets two goals: gathering useful information *and* reaching as many people as possible. To achieve these goals, *you need six things*:

**1. Structured process.** The process must continue to attempt contacts

*beyond the first call*, until further effort is clearly unproductive. Sadly, sales people are likely to stop trying after one or two attempts, even though more messages often are needed to reach even interested prospects. Sometimes the number of attempts will depend on how busy the rep is with other tasks.

Either way, reps are not making the number of calls at the specific intervals that research finds to be optimal.

**2. Structured questions.** Having *structured questions* for each contact ensures that the company gets the most value from each lead reached. While most companies provide training and a structured approach that ensure that salespeople know what to ask, call notes are inaccessible to others. Truly structured questions provide answers in a format that can be analyzed statistically. This exposes *patterns and trends* that would remain buried in scattered account records. Wisely chosen questions can create insight that extends beyond the lead to *show the performance of different marketing messages, lead sources, contact patterns and sales reps*.

**3. Structured measurement.** Define key metrics, set targets for those metrics, compare results to the targets, and explore differences. The metrics must fit into a framework that illustrates how they relate to each other and to business value. Continuous, focused attention to measurement enables you to identify the causes of variations in results and know how to

improve future performance.

**4. Appropriate systems.** *Traditional sales automation systems* are designed to help salespeople manage personal relationships. They may support a structured selling methodology, but they're not built for *high volume, highly structured phone calls* required for effective FCM. The idea is to minimize the effort needed to make the calls, capture answers and outcomes, analyze results, and *feed qualified leads to salespeople*.

## Improving Your Results

Building an effective FCM process takes time. Fortunately, you can follow a proven four-step process:

**Step 1: Self-assessment.** Understand the maturity of your FCM process. At one end of the maturity spectrum is the process of leads being handed from marketing to sales *without any qualification*. At the other end, formal lead scoring and handoff processes are in place.

**Step 2: Planning.** To move to the next level, you'll need a *project plan* that includes *specific objectives, responsibilities, and metrics*. Success involves changes to business processes, with all the planning and training that implies. You won't necessarily need *new systems*, but you'll need to change *how you use your systems*.

**Step 3: Test.** To prove that the proposed cost is worthwhile, select some leads and run half through the proposed process, while treating the other half the way you always have. In most cases, you can do the test quickly and at minimal cost. If you can't do this on your own, hire an outside service.

**Step 4: Evaluate and continue.** Your test plan should include *capturing result metrics*. These will let you quickly evaluate the results and estimate the financial value of expected improvements. If the costs outweigh the benefits, you may need to scale back the project or try a different approach. Factor in the value of future improvements—*continuous refinement* is a major benefit of having a well-organized process.

Moving leads from *marketing to sales* is challenging. Inserting a formal FCM process can reliably bridge the gap where leads are easily lost, ensuring that *each lead* receives proper treatment and uncovering sales opps that would otherwise be missed. SSE

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**ACTION: Improve your FCM process.**



## Nonverbal Skills

Watch your (body) language.



by Carol Kinsey Goman

**M**ANY EXECUTIVES ARE INITIALLY skeptical about body language, but they soon know better. Here's what they learn:

**1. Science has validated the impact of body language.** Body language is the management of time, space, appearance, posture, gesture, touch, smell, facial expression, eye contact, and vocal prosody. *Body language is crucial to leadership effectiveness.* It impacts your ability to negotiate, manage change, build trust, project charisma, and promote collaboration. *Subtle nonverbal cues provide powerful signals about what's going on in a business interaction.* Whether you win or lose a negotiation is strongly influenced by the way your body postures match the other person, the physical activity as you talk, and degree to which you set the tone. By monitoring patterns of nonverbal signals passing between people, researchers with no knowledge of a conversation's content can predict the outcome of a negotiation, the presentation of a plan, or a job interview in two minutes—with 80 percent accuracy!

**2. All people—every direct report, board member, customer, contractor, and colleague—look for facial and behavioral cues to decode meaning.** We knew how to win friends and influence people—or avoid/placate/confront those we couldn't befriend—long before we knew how to use words. We make survival decisions based solely on intricate bits of visual information we pick up from others—almost instantly. We make major decisions about one another—assessing credibility, friendliness, trustworthiness, confidence, power, status, and competence—within seven seconds of meeting. These first impressions are crucial. Once someone mentally labels you as likeable or un-likeable, powerful or submissive, everything else you do will be viewed through that filter. If someone likes you, she'll look for the best in you. If she dislikes or mistrusts you, she'll suspect devious motives in your actions. So, learn how to instantly project the nonverbal signals of warmth, candor, credibility, and confidence.

**3. People evaluate body language unconsciously.** Co-workers may form a negative opinion of you because you slouch, don't make enough (or too much) eye contact, or stand too close to them

when you speak. But, because people are unaware of how or why they make the judgment, they can't filter out their biases. With nonverbal communication, it's not how you feel that matters most—it is how observers perceive how you feel. Those interpretations are often made subconsciously. Hence, your nonverbal signals don't always convey what you intend them to convey. You may be slouching because you're tired, but people read it as a sign of disinterest.

**4. Body language is how leaders express emotion.** The total impact of a message is based on: 7 percent words; 38 percent tone of voice, volume, rate of speech, vocal pitch; 55 percent facial expressions, hand gestures, postures and other forms of body language. The nonverbal aspects reveal underlying emotion, motives, and feelings. In fact, people will evaluate most of the

emotional content of your message, not by what you say but by how you say it and how you look when you say it.

**5. When your body language doesn't match your words, your verbal message is lost.** When your words say one thing and your gestures indicate another, you don't make sense. And if forced to choose between your rhetoric and your body language, people will believe what they see and not what you say.

Nonverbal skills help you develop positive relationships, influence and motivate people, improve productivity, bond with team members, present ideas with more impact, and authentically project your personal brand. **SSE**

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**ACTION: Practice your nonverbal skills.**

## MANAGEMENT/ENGAGEMENT

### Boost Engagement

Build and brand a learning culture.



by Bob Kelleher

**A**FTER THE EXCITING BUILD-up and anticipation for a new year, many of us feel let down when February rolls around. And these post-New Year blues can spill into work, taking a toll on motivation, engagement, and productivity.

How can you keep people motivated and engaged? Here are six low-cost ideas for driving engagement:

**1. Office get-togethers and recognition events should not be one-time events.** Managers should thank and recognize employees every month, as these small, but vital gestures go a long way in building the culture.

**2. Improve your communication process by having frequent and transparent communication.** Create a Communication Promise—a detailed protocol in which you and your management/leadership team commit to communicating to all employees. This protocol should outline a schedule of communications over the year that will be shared with line managers.

**3. Focus on building a learning culture.** Although many training/development budgets have been cut, never to return, a key engagement driver is staff development. You can build a culture of learning without spending lots of money. Stretch assignments, mentor



opportunities, cross-sectional task teams, and luncheon brown bags are all learning opportunities that have great impact and marginal direct dollar costs.

**4. Determine and communicate your employment brand.** Assemble a cross-sectional group of top performers to determine why people work for your company. Consider conducting a culture audit as a place to start. You may discover that you have a hiring problem, not an engagement problem, because you are hiring the wrong people—people who can't succeed in your culture.

**5. Host a YouTube video contest linked to a business imperative.** For little money (but huge engagement benefit), send out Flip cameras to every location or department with a request that employees pick a company value and tell "what that means to me." Establish prizes (they don't have to be extravagant—people will be motivated to participate just because it will be fun and will want their department to win!). Post winners on the company intranet, as well as YouTube.

**6. Have monthly ethnicity theme nights.** This keeps the social interaction levels high. For example, February might be Mexico night, sponsored by Accounting, and all are welcome! March might be Italian night, sponsored by Procurement, and all are welcome!

You don't have to spend much money to gain big engagement benefits. **SSE**

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**ACTION: Try these six engaging ideas.**

# Selling Too Fast

*It often causes lost sales.*



by Kevin Davis

I'VE BEEN DELIVERING SALES seminars for more than 20 years and had a decade of sales and sales management experience before that. When I ask salespeople to tell me *how they sell*, they rattle off the steps of their sales process. When I ask *how their customers buy*, they're stumped. They give me a lot of confused answers.

This disconnect between *selling* and *buying* is the root cause of many problems salespeople experience. For example, I was recently retained by a regional VP of sales for a large financial firm to evaluate the effectiveness of his team's sale of investment advisory services provided to high-net-worth customers. He asked me to be a *mystery shopper*, and at his request I met with one of his salespeople while posing as a high-net-worth customer considering the possibility of changing from my current financial advisor to another investment management firm.

Coincidentally, at the time I actually had a few concerns about my own personal financial advisor, and because I realized that I might change firms as a result of my analysis, I told my client that in order to perform a realistic decision process, I'd also meet with two of his company's competitors. (It's also why I asked to meet his best and most experienced advisor, figuring that's who I'd want working for me should I decide to actually pick this firm.)

Over the next six weeks, I met as planned with the reps of three different investment advisory firms, including one from my client's firm. Each sales consultant was very effective at building rapport, making me feel comfortable and creating a perception of caring.

Yet they all made the single most common mistake that salespeople make: they moved through the steps of their sales process—building trust, identifying needs, presenting their solutions, going for the close—without thinking about where I was in my decision-making process. **They sold too fast.** They put me on *their* sales track, instead of joining me in *my* buying process.

To illustrate what this means, here's a recap of my first face-to-face meeting with my client's investment advisor

(labels are mine, the actions were his):

**Build trust:** The advisor began by learning a bit about me, before sharing about himself, his money management background, education, etc. It was an effective opening.

**Identify needs:** He then asked me some questions. He learned about my financial goals, and that I was dissatisfied with the returns and performance achieved by my current advisor.

**Present solution overview:** He explained that his firm's approach is not to be market timers or "fad chasers," and he told me about his firm's investment model that minimizes risk while maximizing returns. I also learned that his approach to determining his clients' needs was to create a Personal Wealth Plan based on my answers to questions



such as: *Where is my money now? Where would my financial assets be in retirement?*

**Close for next step:** The advisor then recommended we meet again in a few days, and asked that I bring account statements of my current investments.

## Five Big Mistakes

Here are five mistakes he made—all revolving around selling too fast:

**1. He didn't delve into why I thought my returns with my current advisor were poor.** If he had, I would have explained that over the last eight years my portfolio hadn't changed much—little movement of assets from one investment type to another. My opinion was that my current advisor was lazy and took my account for granted. Had my client's advisor asked the right questions, he would have gained deeper insight into my needs, and he would have been much more persuasive later during his solution presentation.

**2. Since he didn't know about my advisor's laziness and slow response, he forfeited a powerful sales tool—**

**getting prospects to think about the possible negative consequences of not making a change.** In this case, had he asked what would happen if I did nothing, I would have thought about the effect of trusting my money to someone asleep at the switch, and about all the fear and uncertainty which that would have entailed. That would have helped me put a face on my future.

**3. He didn't try to find out about my second need.** Usually, the first topic discussed with a prospective client is his or her greatest concern at that time; it's the need that's most developed from the customer's perspective, and the reason the customer agreed to meet with you. Getting prospects to realize they have more than one need for change creates a greater sense of urgency, which adds greater potential value to the solution you will eventually offer.

**4. He didn't ask me about my buying process—how I would make my decision regarding who would get my business.** So he didn't learn that I was going to be interviewing two of his competitors. He lost out on a chance to start answering my question "why should I choose you" before I asked it of him.

**5. He didn't ask me who else would be involved in my decision.** While I could have been acting alone, had the advisor asked he would have learned that my wife is a valued partner in our financial decisions. He could have then sped up our buying decision by slowing down his sales pitch and requesting a *follow-up meeting with my wife and me.*

**Every salesperson wants to sell more.** We all want to make more money and gain recognition for peak performance. To do that, we have to align *our sales behavior* to the customer's buying cycle.

The way to do this is to **slow down.** That's the paradox salespeople have to wrestle with. They will make more sales, faster, *if they slow down each sales call.* They need to ask more questions, probe for more needs, get the customer to think more deeply about the benefits of making a change and the *costs of inaction.* That way, customers will more fully recognize the full range of their needs and the urgency of those needs. When a customer more clearly defines their needs, you have the opportunity to more clearly differentiate your solution in ways the customer will recognize as important. It is this connection with the customer's buying process that will differentiate you. **SSE**

Kevin Davis is president of TopLine Leadership, Inc. ([www.toplineleadership.com](http://www.toplineleadership.com)), a sales training company, and author of *Slow Down, Sell Faster!*

**ACTION: Avoid these five mistakes.**

# Recession Tips

Grow your business and sales fast.



by Larry Benet

AS MOST PEOPLE WAIT FOR the sky to fall and listen to the *doom and gloom* in the news, we just had our best month in over a year, and we know of many businesses whose sales are actually up despite this crazy economy.

## Ten Best Practices

Here are **10 tips** that can help you take your business to the next level, and help you *recession-proof* your personal and business income.

**1. Change your thinking—and you change your life.** I used to be a somewhat negative person, but the moment I decided to focus on expecting positive things and being a ball of energy that is contagious—amazing things started to happen in my life and work.

**2. Surround yourself with positive people, messages, and images.** If necessary, don't read the news, turn off the TV, and change your environment.

**3. Refuse to participate in this recession.** Yes, the past year has been tough. I've faced my fair share of challenges. But I refuse to participate in this recession. How about you? I hope you decide not to participate—or no longer participate in it—either.

**4. Get an accountability partner—and have consequences for not following up on tasks you commit to.** If you say you are supposed to make 10 new sales call a day, and you don't do it, what are the consequences? If you say you are going to work out four times a week, or have a date night once a week with your significant other, what are the consequences? When I miss an accountability call with my partner, I pay \$50 to him or his favorite charity.

**5. Get a mentor.** I used to try to figure out things on my own, thinking that was the cheaper way to go. Well, it took forever; and half the time, I didn't get the results I wanted. You are paying for *not* having a mentor, whether you like it or not. What is the one area in your business or in your life where you are not getting the results you want—or it is taking longer than you would like to reach that goal. When you have a problem and feel stuck, get on the phone with one of your mentors. Next thing you

know, in a matter of minutes, the problem is solved.

**6. Create your own Board of Advisors.** Create your own board of advisors or build your own *Power of Six* as my colleague Dave Stech.

**7. Call your clients.** Find out how they are doing, what they need, and how else you can serve better them.

**8. Call your top prospects.** When the economy gets tough, and the news is bad, people get paralyzed from fear. They stress out about their business, their money, they think the worst is going to happen to them. Be the beacon of light they need to get them through this tough time. Give them ideas that can help them not only survive but *thrive* in this economy.

**9. Raise your expectations and your performance standards.** Some

examples of that for me include getting a personal assistant to manage my personal affairs, not my business affairs. Getting an assistant who travels with me at all times (in addition to an assistant who is back in the home office handling the day-to-day business affairs).

**10. Building deeper relationships with more influential people.** I'm known as The Connector because I have mastered the art of networking with the rich and famous. Who can help you grow your business and make more sales? How can you build a deeper relationship with these people?

What is your best idea for winning big in this crazy economy? **SSE**

Larry Benet, aka The Connector, is a Master at Networking with the Rich and Famous. Visit [www.LarryBenet.com](http://www.LarryBenet.com) to learn about Connectivity.

**ACTION: Recession-proof your business.**

## MANAGEMENT/REVIEWS

# Coaching Culture

Take four actions to create one.



by John Anderson and Marc Michaelson

ANNUAL PERFORMANCE REVIEWS (APRs) can be invaluable in maintaining alignment between employee performance and management's goals and expectations. However, *they do little to improve performance*, enhance skills, or develop leadership qualities. Even so, most managers use APRs as part of their employee development!

This is troubling. The one tool employers rely on most to develop talent is *not* going to deliver desired results. To make APRs more effective as a developmental tool, make coaching and mentoring (C&M) an *integral part* of your culture.

C&M cultures inspire employees to give their best, to perform to the highest standards daily. You could hardly expect the same from a culture that checks in with employees once a year. In C&M cultures, *performance reviews happen all the time* (at least monthly). The *review* becomes just that—a *review* of the challenges, issues and progress that managers and employees have talked about *during the year*. Using APRs in this way is just one hallmark of C&M cultures. To build such a culture, also *take these four initiatives*:

**1. Assess and develop employees**

*and organizational emotional intelligence.* EI is the ability to understand, manage and respond effectively to your emotions and the emotions of others—a quality of effective leaders. EI helps create cultures where people collaborate and aspire to do their best work.

**2. Hold regular one-on-one reviews.** Having regular one-on-one reviews enables employees to make frequent adjustments to their performance and validates your commitment to helping them succeed. To transform reviews into a collaborative coaching relationship, offer developmental coaching in addition to providing the usual feedback, and create a joint vision of ongoing goals and objectives during each review.

**3. Develop your collaborative advantage.** You gain strategic and competitive benefits when you cooperate with all stakeholders—inside and out—for the benefit of *we*, not *I*. To achieve these benefits, you need to institute *policies and practices* that spread responsibility, authority, and accountability.

**4. Create a best place to work.** Best places to work have high trust between managers and employees. As a result, their people are more creative, productive and loyal. And they attract and retain the best talent. Trust breeds pride, enthusiasm, and peak performance.

*These initiatives bring* greater profitability, improved productivity, and better retention of top talent. **SSE**

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**ACTION: Take these four initiatives.**



# People Skills

Depuzzle human behavior.



by Karla Brandau

**C**AMARADERIE AND PRODUCTIVITY involve relating to others across a chasm of behavioral differences. Improving your people skills helps you figure out how to bridge the gap between yourself and others, thereby making the culture more supportive and collaborative.

When individuals lack the *people skills* of communication, flexibility, and accommodation, the culture is often tense. Are individuals free to focus on goals instead of climbing the walls thrown up by misunderstanding and opinions hardened in concrete?

You spend about 80 percent of your time communicating daily—and likely spend 80 percent of that time puzzled about the perceptions, views, and responses of co-workers, peers, customers, and family members. You might even wonder what UFO dropped them off and forgot to pick them up.

These tips will help you depuzzle human behavior:

**1. As-is.** Accept that *there are four main styles of functioning and you represent only one of the styles*. Therefore, 75 percent of the world sees life differently than you do. To de-puzzle behavior, accept the other person *as is*—just the way they are. You'll never change them to see your exact point of view.

**2. Strengths.** Focus on the strengths of the other person, not the liabilities. Contrary to the way some people believe and act, everyone has weaknesses. No one is perfect in every way. So de-puzzle them by separating out strengths from weaknesses.

**3. Activities.** Take note of *activities*. Where they invest their time tells you what they value. Do they volunteer for problem-solving or risky projects? Are they involved in associations or *ad hoc* committees for improvement? Do they take extra time for their children's activities? Are they involved in a political party or a religious group? Make quiet observations—you'll learn much.

**4. Observe surroundings.** Observe their desk and their dress. Are their desks meticulous? Do they dress in a casual way or flashy way? People who have very clean desks often like *extreme detail* in presentations and sup-

port materials. People who dress casually usually have a more relaxed and "homey" way of relating. And people who are flashy dressers tend to like action and fun activities.

**5. Their reasons, not yours.** People do things for *their* reasons—not *yours*. When you know their reasons, you can influence them in a personal way.

**6. Generational differences.** Place them into their generational perspective. People who are Baby Boomers see work and relationships very differently than the Gen X'ers. Each generation has its special needs. Listen to them. Ask them questions. You will discover how to design your interactions to fit their age and perspective of life.

**7. The stress factor.** People who are under stress are always puzzling. They act in strange, irrational, and immature ways. Don't try to understand them if they are angry. Let them vent and calm down. If they are frustrated and overwhelmed, help them work through their problems. As you talk with them, offer insights and alternative viewpoints. Usually *people under stress have tunnel vision*.

**8. Learn how to disagree, but still be friends.** Everyone wears a sign that says, *Don't make me wrong, just kindly disagree*. See that conflict is not necessarily good or bad—it just is. In order to de-puzzle conflict, let it be a *tool for generating ideas*, then taking opposing ideas and creating a better solution.

**9. Offer respect.** The highest form of respect is to *listen intently to other's thoughts*. Don't dismiss an idea before the person who originated it is finished explaining how it will work. If you do, you may wonder why their behavior is stand-offish. This puzzling behavior, however, is your fault.

**10. Try a little charisma.** Smile at them. Compliment them. *Sincere and deserved flattery will still get you everything*—including more open and honest relationships. Why? At our warp speed of life, we rarely take enough time to be friends and to give sincere thanks for hard work and extra effort provided by others.



## Help Your People Do More

*Overworked employees are prone to errors, accidents, and low productivity. We tend to send mixed signals today about long work hours: we agree with employees having a pity party about how hard they work—yet we reward employees for going the extra mile.*

Overworked employees should be taken seriously. Employees who are overworked are more likely to exhibit anxiety, make mistakes, harbor angry feelings about their employer for expecting them to be on the job for long hours and resent coworkers who don't pull their share of the load. Nearly half of employees who feel overworked report that their health is poor and 8 percent of employees who are not overworked experience symptoms of clinical depression compared with 21 percent who are highly overworked.

**What can you do to help employees feel less overworked while still finishing their tasks each day?**

Using time efficiently at work is a big issue. You can help employees reduce the feeling of being overwhelmed by: training employees in time management principles, discouraging the practice of eating at the desk and working through lunch, insisting employees take vacation

time, permitting flexible work hours when appropriate, encouraging non-interrupt zones in the day when workers can focus on their tasks, assigning tasks well in advance of deadlines.

**To be efficient, you must first be effective.** For instance, you might be highly efficient in manufacturing techniques, *but if no one buys your products, you are not effective*. To encourage efficiency and effectiveness, you can have clearly stated goals with built in deadlines, insist employees make a daily *to do* list, ensure equipment works properly, supply the necessary materials for job completion, and train employees on software packages that enable more efficient work. By doing these things, you help employees leverage their time in the office and be more productive.

Make an effort to grease the wheels of productivity, and not be *the stick that gets caught in the spokes*, catapulting the rider from the trail. Help workers *feel less overwhelmed, do more in less time, and achieve desired results.* **SSE**

Karla Brandau is CEO of Workplace Power Institute. Call 770-923-0883, [www.WorkplacePowerInstitute.com](http://www.WorkplacePowerInstitute.com).

**ACTION: Improve your people skills.**

## Proactive Strategies Communicate for best results!



by Janet Boulter

**T**ECHNOLOGY WILL CONTINUE to shape the way we communicate, market our products/services, and conduct business. I invite you to create and deploy a *cost-effective* and *comprehensive* communications program to *grow profitably*.

Technology now enables managers to reach targeted audiences worldwide. Now's the time to use technology to *customize* your communications and target your messages to ensure you connect with customers and employees in an effective and engaging manner.

Establish connections and then turn those connections into relationships. The more engaged someone is with a company, the more likely they are to stay connected (loyal). To develop *effective relationships*, your engagements should be designed around *two-way dialogue*.

You likely have an *external communications program* that enables you to market and advertise to your customers, and yet you may fail to engage them. Your communications tend to be *focused outward* and do not solicit input and feedback from customers. Most loyalty programs are focused on giving offers and deals—not soliciting suggestions, feedback or asking for ideas.

Modify your program to include a *customized program* where you *target your messages, style your communications in a way that works for individual customers, and ask them to participate* in growing your company, improving your products/services, and innovating new ones. Ask: what features/benefits would they like? What are they willing to pay for? How can doing business with your company be easier, more enjoyable? Consider using surveys, customer participation or advisory panels, innovation committees, and idea forums to engage your customers.

A *good external communications program* will enhance customer relations, drive engagement (sales), increase customer retention, differentiate you from competitors, and improve quality.

Beyond communicating regularly with customers, you need an *internal communications program* to engage and keep employees informed. *The more informed your employees, the lower your turnover and higher your productivity*. All employees need to understand the

company's vision, mission, core values, strategy and goals. *Communicating this big picture often will help keep them focused and engaged*. Also, share financials and revenue goals quarterly, so employees see where the company is headed and what their role is in achieving growth goals. Create *monthly communications* that discuss the *six-month strategy* and goals of each department and company.

*Continuously communicate to your employees their role in achieving company and team goals*. Let them know how their skills and talents contribute. Send them the feedback you receive from customers and solicit their ideas for improving service. Ask them *what are reasonable sales and revenue goals?* Ask them to participate in cutting costs and improving processes and procedures. The more they *participate*, the more *vested they'll be in achieving goals*.

Consider creating employee committees. Ask employees from all areas to participate on internal committees with regards to product/service launches and improvements, customer relations, strategy and growth initiatives. The more informed and engaged your employees, the lower their stress and the higher their productivity.

*Set specific guidelines regarding social media*. Your *company's reputation* is one of your most valuable assets, and you need to protect that asset. It's easier and less expensive to *manage your reputation* than correct it once it's tarnished.

Develop and deploy *proactive communications* to grow business profitably! **SSE**

*Janet Boulter is a consultant, trainer, speaker, business reconstructor, and CEO of the Center Consulting Group. Call 303-368-9954, email jrboulter@centerconsultgroup.com, or visit www.centerconsultgroup.com.*

**ACTION: Customize your communications.**

MANAGEMENT/RECRUITING

## Your 'A' Players Your future depends on them.



by Mike Sipple Jr.

**I** WAS ONCE ASKED TO SHARE what defines *A players*: "What characteristics and traits should we look for in recruiting *A talent* to join us in key positions."

I am passionate about attracting, recruiting, developing, engaging, and retaining top talent. As a second generation recruiting executive, I consider this business to be a *calling!*

First, I must say that this client's mindset is unique. *Too many managers get comfortable in recruiting talent and never move the needle beyond the point of yesterday's success*. This client sees a chance to capitalize on what success looks like for the future. It's exciting to partner with companies that are action- and results-oriented! They want to complement what *has made them successful in the past with what will make them successful in the future!* They want to soar beyond where they are today.

Second, I believe that an *A candidate* for one client may not equal an *A candidate* for another. However, there are traits that characterize top talent today.

I believe that *10 traits* define *A candidates* and *top talent* in today's market. This list is based on what we learn from our client engagements and the dynamic definition of *ideal talent* in the marketplace. That said, here are my



### Top 10 Attributes of A Talent:

- They have positive attitudes and give positive energy.
- They are *Connectors* and *Relationship Builders* with excellent relationship and communication skills.
- They understand the differences between *leadership* and *management*—no matter what their position today!
- They are collaborators—they encourage and enjoy teamwork and collaboration but are willing and able to challenge status quo.
- They project *authenticity* and possess the ability to quickly establish trust and credibility.
- They are change agents—they encourage new ideas and think outside the box.
- They roll up their sleeves and get hands-on when necessary—I call this the *can-do/will-do* attitude).
- They fit the culture and chemistry of the organization, leadership team, and those around them.
- They take initiative and are consistently self-motivated to take action and create desired business results.
- They desire and seek ongoing development, professionally and personally.

The executive team that asked this question has been wildly successful for decades, and yet they're reaching for a new level of success. We've focused on strengths while recruiting talent that will stretch their minds and business.

*What attributes, skills or traits do you seek in top candidates and A talent?* **SSE**

*Mike Sipple Jr. is VP of Centennial, Inc., an executive recruiting, talent strategy and career coaching firm. Visit www.centennialinc.com or call 513-366-3760.*

**ACTION: Recruit A Players for your enterprise.**

# Approachable/Profitable

Lessons learned from wearing a nametag.



by Scott Ginsberg

I'VE BEEN WEARING A NAME-tag for 10 years—never taking it off. I even *tattooed my nametag on my chest*, and have made a career out of wearing a nametag. Why? I developed the *nametag profession* as a way to teach people how to overcome their shyness and the awkwardness of making that first introduction. In the process, I've become the authority on how to be *approach-able* and *profit-able*.

The only thing in life that you have control over is yourself. You greatly increase the odds of good things happening by making yourself more *able*.

In my new book *Able*, you'll find 35 strategies for increasing the probability of success, including: How to be more *find-able*, *refer-able*, *sell-able*, *advance-able*, *book-able*, *brand-able*, *buzz-able*, *callback-able*, *sough-after-able* and *unstop-able* in all you are trying to achieve. Observe these 10 principles:

**1. Ideas are free; execution is priceless.** Anybody can wear a nametag, but few can leverage a simple idea into a six-figure enterprise. Your big advantage is when *nobody can keep up with you*. You have to be *dangerously prolific*. That's how you out-execute the competition. And here's how: *executional velocity*—take action quickly; *executional volume*—take action prodigiously; *executional value*—take action exquisitely; and *executional vitality*—take action consistently. *Are you an idea person or an execution person?*

**2. Never be stopped by not knowing how.** Accept that the planets will never be aligned. Don't wait until *everything's perfect*, until you're *experienced enough*, until you know what you're doing, until you have overwhelming evidence to trust yourself. Heighten your impatience; enter into the heart of action—jump high, hoping there's water below. Otherwise *procrastination*—the redneck second cousin of *patience*—will rob you of the motivation you need. *Finished is the new perfect. How will you leverage impatience as fuel for your motivation?*

**3. Ambition without focus is bankruptcy.** How you spend your day—hour by hour—determines how much money you make, how happy you are, how healthy you are, and how success-

ful you become. You don't need to choreograph every waking hour, just design *an ideal day* for you that enforces some structure and predictability, while still leaving room for spontaneity and playfulness. Ask yourself if what you're doing, this moment, is consistent with your number one goal. *Have you pictured your ideal day yet?*

**4. Anonymity is the biggest barrier to success.** I wear a nametag 24-7. I have *zero anonymity*. I'm not suggesting you do the same. In fact, I suggest you do not. But consider the adverse relationship between *anonymity* and *profitability*. A good start would be to throw away your *marketing plan* and begin writing a *visibility plan*. Because it's *who you know*—not who knows you—and whose life is better because they know you. *How are you making people aware of you?*

**5. Beware of the over-commitment trap.** It's like owning a truck: The week you buy it, *everyone needs help moving*, and you become entangled in other people's agendas. Learn to be *respectfully discerning* about whom you give permission to participate in your life. Ask: *Is this person asking me to create a future that I'll feel obligated to be a part of? Is the level of help this person is asking me to offer commensurate with the type of relationship I have with them?* If you don't set healthy boundaries for yourself, other people will set them for you. And then they'll violate them. *Are you spending too much time being everybody else's dream machine?*

**6. Consistency is far better than rare moments of greatness.** When I talk to fellow authors, they're always *working on their next book*. But when I ask them *the only question that matters—What did you write today?*—they fumble to answer. This means they're *inconsistent* (and their book stays inside them). Tragic. Writers who discipline themselves to write every day create amazing books. Consistency is the engine of exquisite execution, and the conduit of character. There is no royal road to greatness except by constantly plugging, every day. *What action have you taken on your idea, today?*

**7. Strike a passionate pose.** You need passion to execute exquisitely; however, passion without purpose is pointless. Otherwise your passion becomes nothing but a beautiful blazing fire that burns you and everyone you touch. To gauge the relevancy of your passion, ask yourself: Is your passion irrelevant to the marketplace? Is it inherently interesting, but difficult to sell? Is it intrinsically appealing, but something you suck at? Avoid striking a passionate pose that nobody notices. *Are you operating out of your passion in the most profitable, healthy way?*

**8. Hacking isn't cheating.** In the game of life, you have a few options: Change the game so there are no rules. Change the rules so you can win at your game. Play the game but become the exception to every rule. And the question to ask when faced with a rule is: *Can this rule be ignored, modified or changed?* Give yourself permission to



*refuse to accept your current circumstances.* This enables you to *create a new set of circumstances*. Learn the rules, and which rules are irrelevant. *What could you do that is the opposite of everyone?*

**9. Get comfortable with the risk of failure.** If you screw up *early enough*, *quickly enough* and *quietly enough*—and extract lessons learned

—only a few people will notice. That's why *mistake* is the mentor of man. The challenge is *attending to your failures with a mindset of personal growth, life-long learning, and never-ending improvement*. Do this, and disappointment will dissipate, discomfort will be less threatening. Then, ask: *What do I need to learn about this mistake to make it no longer a mistake?* People aren't averse to risk—they're averse to *loss*, often the result of risk. *What can you lose today?*

**10. Make a public, purposeful choice to play big.** I started wearing a nametag 24/7 in 2000, started a company in 2002, but didn't see profit until 2005. The year I started making *real money*—and *real meaning*—was the year I got the nametag *tattooed on my chest*. When you publicize your commitment—to *commit enough so you can't turn back*—providence orchestrates the perfect conditions. At that point, *executing what matters* will result. And people won't just *pay attention*—they'll *pay ample money*. *Is your commitment unquestionable?* SSE

Scott Ginsberg is author of 35 Strategies for Increasing the Probability of Success. Call 314-256-1800, or email [scott@hellomynameiscott.com](mailto:scott@hellomynameiscott.com).

**ACTION: Become more approachable/profitable.**

# Social Media

## Implement five strategies.



by Heather Lutze

**H**AVING A BUSINESS PRESENCE in social media (SM) communities—*Facebook*, *Twitter*, and *YouTube*—can positively impact your bottom line. Connecting with customers and prospects builds loyalty and community, and SM marketing is changing customer relations. When creating a SM strategy, some managers ask, “Do we open this up to the company?” Some argue that allowing employees to access SM sites will result in a productivity drain, and so they put filters in place or ban SM sites.

However, when employees visit SM sites, it provides a mental break and increases their concentration and productivity. People already have some distractions. The question is, Do you want to offer a *suitable distraction*?

You can’t simply allow everyone to post to the company’s SM sites arbitrarily. *You need to set rules of engagement.* Follow these six suggestions:

**1. Put everything in writing.** Detail *what is* and *what is not* allowed to happen on your SM sites. You may want to specify such things as *not sharing proprietary information, keeping all posts positive, not sharing client information, not divulging salary or benefit information, and not revealing any proprietary intelligence.* What you allow is up to you and your culture. Some companies decide that they will talk about their clients and customers (with the customer’s permission), while others don’t. Have each employee sign off on the SM rules and place a copy in their file. Make it clear that if they break any of the rules, their job is in jeopardy. Also, reveal whether HR is monitoring the emails, posts, and tweets.

**2. Start by giving SM access to certain people to test the waters, then open it to others in phases.** Start by forming a SM committee. Invite certain people to join (make it optional). Those who come to the meeting will be the best people to represent you on the internet. Work with them to help clarify the rules and define your purpose for being on the SM sites. Then, allow these people to become your SM advocates. After a few weeks, have them report on what’s going well, what they’ve learned, and what’s not

working. After making adjustments based on their feedback, open SM up to another group, and then another, until you have everyone on the sites who wants to be there. Don’t force it. If someone doesn’t want to tweet, blog, or do *Facebook* posts, that’s okay.

**3. Make it fun.** To get people excited about SM, have a *contest*. Give everyone (or every team) a promo code for a special sale or event. Then, let people market to their family, friends, customers, and social networks. The person or team with *the most promo codes redeemed* gets a gift or prize. One retailer did this and had a \$3 million bottom-line boost!

**4. Consider IT and other staffing needs.** When facilitating SM access, opening the company outside the corporate firewall, *ensure you protect compa-*

*ny assets.* While doing SM posts can be a rewarding part of people’s day, eventually you’ll need a full-time staff member to oversee SM activities.

**5. Implement your SM activity and policy from the top down.** Your executives need to dive into SM activities. If the CEO is on *Facebook* and posts tweets on *Twitter* and blogs regularly, employees will embrace social media as well.

*SM for business is not a fad.* It may morph and change, but *it won’t go away.* Those companies that embrace it now and get its employees involved will reap the most rewards. **SSE**

Heather Lutze is CEO of The Findability Group and a speaker and author of *The FindAbility Formula* (Wiley). Visit [www.FindabilityGroup.com](http://www.FindabilityGroup.com).

**ACTION: Set your SM guidelines.**

## MANAGEMENT/RECRUITING

### Social Media Recruiting

#### Reach out to recruits.



by Sherri Elliott-Yearly

**I**N JUST A FEW YEARS, newspaper ads have been almost entirely replaced by online job boards. Now, active recruiting at job fairs has met its match in social media. This new method of finding, screening, and recruiting employees has incredible power to advance goals—at a value price.

As you make forays into social media (SM), rely on three key sites: *Facebook*, *Twitter*, and *LinkedIn*.

**Use these sites to research potential job candidates.** You can check out an applicant’s *Facebook* or *MySpace* page to see comments and photos. This may reveal more than a phone call to a reference. A picture can be worth a thousand words. You can maintain SM pages at little cost, yet create an effective means of recruiting excellent candidates.

Your *SM recruitment strategy* should contain eight elements:

**1. Create a rich user experience for social networkers.** Set up a *Facebook* page or tab for recruiting. Establish a *Twitter* account for your company’s HR department. Include links to your corporate web page, featuring rich, inviting content geared toward potential employees. Make it easy for them to learn about your company. Ensure that the look and feel of your SM sites is consistent with your branding efforts.

**2. Make your social networking pages transparent.** Use a *Facebook* page



to show prospective applicants what it is like to work in your organization.

**3. Open the conversation.** Use *Facebook* to converse with potential employees. Post openings on *Twitter* and respond to inquiries. Keep it light, honest, and welcoming. Allow people to comment on your recruitment process and learn.

**4. Build your network.** Nothing draws *Fans* and *Followers* to SM sites like great advice and expertise. Provide tips on the job market, good resumes or networking to enhance your chances that top talent will *engage with your content*—and apply for a job with your company.

**5. Leverage the web, but don’t rely on it exclusively.** The Internet—including SM—is a great way to find quality people. But *the web should not be your only source* of background checking.

**6. Move fast.** Top candidates move quickly, and so should you. Delays cause you to end up with *second-rate hires*. Monitor SM sites daily.

**7. Ask for help.** When you *Tweet* a new job opening or post it on *Facebook*, encourage *Fans* and *Followers* to share it with qualified friends.

**8. Measure your results.** Ask: *Where did you get this month’s new hires? How did you find the candidates who stayed for the long-term? Which method of recruiting quickly generated a slate of qualified candidates?* Answer them to find new ways to refine and improve your SM presence.

Social media is an invaluable recruiting tool. *Make these eight elements a reality* for your company and candidates. **SSE**

Sherri Elliott-Yearly is founder of Gen InsYght, the CEO of Optinance Workforce Strategies, and author of *Ties to Tattoos*. Visit [www.geninsyght.com](http://www.geninsyght.com) and [www.tiestotattoos.com](http://www.tiestotattoos.com). Email [sherri@geninsyght.com](mailto:sherri@geninsyght.com).

**ACTION: Use social media to recruit top talent.**

# Women Win

*Cultivate female strengths.*



by Barry Libert

**W**E'RE ALL AWARE OF THE glass ceiling, wage gap, and struggles for workplace equality. From 2000 to 2007 the number of women managers increased by only 1 percent (and they're still paid less). But the rise of social media will dramatically shift this picture. And, as social media transform the way we do business, *feminine qualities will become more valuable than ever.*

Studies on gender differences come to two conclusions: Males are aggressive; females are nurturing. Men are competitive, combative, and self-centered. Women are collaborative, communicative, and community-centered. As social media takes hold and changes the way we do business, managers who see the importance of caring and nurturing qualities will grow and prosper.

Women tend to make deeper emotional connections with colleagues and business partners. Women leaders tend to exhibit more social and emotional skills—sharing, caring, and putting others first. The way women lead is very valuable as businesses become social enterprises. So, it's time to *woman up.*

This does *not* mean that men can't be great leaders in socially driven businesses. Leading socially and designing a business as a social organization are challenging for both genders. But companies that level the playing field for women, and men who cultivate feminine characteristics, will prosper.

Whether you're a man or a woman, start embracing your *feminine side* (yes, many women have squelched their natural leadership style). Here are *seven tips* for becoming a great social leader:

**1. Get to know the people around you.** Women tend to be *people persons* at heart—and so do great social leaders. Allow yourself to care about the people who work for you. Get to know what motivates and inspires them, and what they want at work. Listen to their desires and complaints. Women usually excel at this because *they tend to lead the social dynamics in their families*, but men can do it, too. Find out what matters to the people around you to engage with them and to provide for them, on their terms.

**2. Know what you are not—and ask**

*for help when you need it.* When lost, men often refuse to stop and ask for directions. And wives are saying, "Please, just stop at this gas station—I'll go in and ask!" In business, women are more likely to do what they do best and rely on others to complete the rest. Honestly and accurately *assess who you are*, what type of leader you are, which skills you possess, and which ones you lack. Improve your social and emotional skill sets. Learn to collaborate while you lead. Recognize your weaknesses and surround yourself with professionals who complement you.

**3. Let others lead, while you follow.** Women tend to have *less ego* as leaders. They don't mind letting others take the reins when it makes sense. And that's a good thing, because traditional leadership no longer works in the social business world. To be a good social leader, subjugate your needs for the betterment of the community. Follow your leadership team, listen to your newest hires, put yourself where they are, and hear the other perspectives. Let your



employees lead the way. Give them permission to succeed as well as fail. Be supportive in the background and understand that *you can't always be in control.* Allow the group to drive the agenda while recognizing that the health of the community requires that *the community* dictate what it looks like.

**4. Know how others perceive you.** Women tend to be more *self-aware.* They understand how others view them and what they do that influences these perceptions. As a social leader, you need to honestly ask yourself: *Am I intimidating? Do I have a loud and booming voice that dominates any room I walk into? Is my demeanor aggressive or threatening?* For a change, be silent; sit back from the table, or in the corner of the room. Minimize your presence and pay attention to how your dynamic changes the tenor of a conversation or meeting.

**5. Embrace a social culture.** Women leaders are driven by self-awareness, happiness, emotional and physical recovery, engagement, and reciprocity and recognition. These attributes are

based on female leaders' core needs to help grow the talent of their people, to tolerate change in people, and to create real impact, including personal renewal and internal joy. Anyone, regardless of gender, can contribute to such a culture. A social organization embodies an openness of expression, an openness of networks, and an openness that allows for both risks and rewards. Social culture stands for something that only your company can create. It's something personal that comes from within. That's what makes it lasting, exciting, powerful, and magnetic.

**6. Focus on what's in it for others.** Men tend to be focused on meeting linear goals; women are building bridges that may serve them in the future. Likewise, traditional leaders think about making products and providing services for ROI. Social leaders think about what's in it for other people as they begin to build a loyal following. Don't get me wrong. Any good female leader will carefully consider the business side of every issue, but they recognize that those issues are part of a big picture that includes their employees, customers, and communities. Social models are revenue models that enable others to benefit from what you are offering while connecting emotively. Show your communities what's in it for them. The more you do, the more they'll benefit; and the more they benefit, the more they'll return to you."

**7. Remember, business is personal.** Women tend to demonstrate humility, caring, and openness. At work, they tend to speak to coworkers like they speak to their families—which encourages people to talk. Like it or not, *people bring themselves, their personalities, their voices, and their personal selves to work.* Social leaders, both women and men, embrace this reality, because they understand that it enhances business.

Making business personal is about showing that you are a person with passions, interests, fears, family, and friends. *Listening to what people want, how they feel, and what makes them tick enables social businesses to improve customer experiences and create attractive communities.* Make your business social; bring your personal self to work; show people that *you're human.*

Today, meeting people's social needs for connectedness is the key to success. To succeed in the age of relationships, embrace feminine values. **SSE**

*Barry Libert is author of Social Nation (Wiley) and CEO of Mzinga. Call 800-225-5945 or visit [www.socialnationbook.com](http://www.socialnationbook.com).*

**ACTION: Manage more from your feminine side.**

# Service Ratings

*Do clients love or leave you?*



by Jeffrey Magee

**M**ANY SALES MANAGERS feel that they have customers largely because of the great product or service they offer. This may be true, but your understanding of how your firm measures up on an objective Customer Service Index (CSI), may reveal *why a customer truly does business with you* and why the same customer may leave.

**Building customer loyalty today is an extremely difficult task.** Just providing a customer with excellent care may actually be the impetus for a customer to leave. To ensure that a customer gained is a customer kept, sales professionals and internal customer care agents must continuously strive to provide exceptional customer care.

Customers measure two basic variables delivered by firms from which they purchase. These two variables are measured on a scale of low to high. The measure of these two variables influences the prospects'/customers' buying or repeat buying decisions. These two variables also directly influence a buyer's loyalty.

Measure how a customer might rate the actual product or service being purchased on a vertical axis, from low at the bottom to progressively better the higher up the scale the feedback reveals. Then measure how well the people associated with the transaction handled the encounter, from poor/low to the left and progressively better the further to the right the feedback reveals.

- A CSI score in the bottom left quadrant would be labeled *Poor* customer care and would lead to lost business.

- A score in the bottom right quadrant would be labeled *Excellent* customer care. Although the product or service they are buying didn't meet or exceed their expectations, sometimes it is the sales professional who maintains the business and carries the organization.

- A score in the top left quadrant would be labeled *Excellent* customer care also. Again, a very misleading label, and the sales professional's understanding must be that business is taking place here, largely because of product or brand loyalty, not because the sales professional is delivering great care. This, too, leads to future lost business.

*The ultimate goal of every sales pro is to have a CSI score in the top right quadrant (signaling the product/service and sales professional both exceed the customer's expectations. This is labeled Exceptional customer care!*

Customers who score you in the bottom right quadrant leave when their relationship with a sales professional ends. The same is true for top left quadrant business. As soon as another vendor enters your market with an equal product or service, customers will leave in droves—as they're tired of giving their money to an enterprise whose salespeople and service reps don't appreciate them. Strive for business transactions to be top right quadrant activities.

To identify why customers love you or leave you, and what can be done, try this: Pair off with a colleague, draw a CSI chart on a flip chart, white board,

or cork board, and have each team throw a tape ball at the chart from a distance. Where their tape ball lands is the quadrant for which the team has to prepare a sales presentation—to overcome any negatives or reinforce the positives, in order to keep a customer.

Think about *why we're losing customers, or can't recruit new customers.* Ask yourself and team these questions, and be open-minded to see the reality. You can then work on the solution—where the real innovation and opportunity emerge. It's time to do more to make customers happy. After all, *it's far more cost-efficient to keep current customers than to ignore customers who leave and try to sell to new prospects.* SSE

Jeff Magee is author of Performance-Driven Selling. Visit [www.JeffreyMagee.com](http://www.JeffreyMagee.com).

**ACTION:** Learn from your customer ratings.

## SALES/GUARANTEE

# Selling to Skeptics

*Put money where your mouth is.*



by Pamela Yellen

**I**F YOU DON'T OFFEND *Somebody* by noon each day, you are not doing much, says business-building expert Dan Kennedy.

Do you sell something unique, like a product or service that's revolutionary, or higher (or lower) priced—something that makes prospects skeptical?

After investigating over 450 financial products and strategies, I concluded that people have been brainwashed into believing they must risk their money in order to grow it.

I discovered an old method for growing a nest egg safely and predictably. I call it *Bank On Yourself*. I consider it to be the best way to invest money. But few people knew about it—and so it became my mission to educate people.

Nothing could have prepared me for the controversy that followed. I immediately incurred the wrath of Wall Street, banks, and finance companies, as well as the financial advisors who were planted in conventional investing and retirement planning methods.

Hundreds of thousands of people use this *Bank On Yourself* method, and not one lost money when the stock and real estate markets crashed. In fact, their plans have all continued growing—safely and predictably. But I faced the challenge of dispelling myths and

convincing people to open their minds to a different way of doing things. Getting hate mail daily caused me great pain, and at times I considered giving up.

I came to realize that if everybody already accepts what you do, you're not making an impact or bringing value to the world. The attacks continued, but I couldn't give up. I was compelled to share *Bank On Yourself* with people who had so little to show for doing all the right things they'd been taught.

## Make a Bold Guarantee

One day, in an hour of despair, I seized upon a scary and risky idea: I decided to put my money where my mouth is, list the advantages and guarantees of *Bank On Yourself*, and offer a big cash reward to the first person to show they use a strategy that can beat it. I started with a \$10,000 reward; then, when my book on *Bank On Yourself* was released, I upped it to \$100,000!

It's worked! It's an effective "carrot" that motivates people to investigate.

**Make the biggest, boldest guarantee you possibly can.** And don't water it down with a bunch of fine print or weasel language. Think about what you could do to get your foot in the door with skeptical prospects. For example, you could guarantee the initial meeting or service: "If you feel your time was wasted, I'll pay you or your favorite charity \$100!" Some people may try to take advantage of you, but your sales will more than make up for it. SSE

Pamela Yellen is a consultant to financial advisors and author of *Bank On Yourself*. [www.BankOnYourself.com](http://www.BankOnYourself.com)

**ACTION:** Make a bold guarantee.

# Brainstorming

Observe 10 commandments.



by Josh Linkner

**B**RAINSTORMING IS BIG TODAY, but in becoming ubiquitous it has lost something. The invitation “Let’s brainstorm” typically leads to a gathering in a conference room where the convener asks for ideas then shoots them down as fast as they come up. Brainstorming has been compressed and made more efficient—killing its real purpose in the process.

The point of brainstorming is to let creativity shine. You need to be very careful not to let criticism stifle that creativity. The creative process must be supported, nurtured and embraced wholeheartedly to generate good results. To that end, I’ve developed **10 commandments of brainstorming**, universal rules to help establish a framework for imagination and creativity.

Print out a copy of these rules and tape them to the wall before any brainstorming session. I’d also suggest you bring a bell, kazoo, drum or other noisemaker to the session. Every time someone breaks one of the commandments, ring the bell or beat the drum. Make your whole team responsible for enforcing the rules and holding everyone else accountable. Think of the rules as non-negotiable and make sure everyone on your team agrees to them before any idea generation begins.

**1. Thou shalt not judge.** As ideas begin to flow, you must do everything in your power to let them flow. No one should be allowed to offer any judgment of any idea. The idea-generation phase is about generating ideas, not ranking them. Just let them run like the mighty Amazon. There will be plenty of time to evaluate them later.

**2. Thou shalt not comment.** Even if the person next to you throws out *the stupidest idea you’ve ever heard*, let the process continue. *The slightest comment or criticism will change the mood*, and the group will clam up. The aim is to bring ideas to the surface, *not* discuss them. The only acceptable comment is a very short *wow, cool, or sweeeeeet*.

**3. Thou shalt not edit.** Don’t let your inner editor join the session. When you’re brainstorming it doesn’t matter where the comma goes in the sentence, or how best to word some-

thing. The font choice, color palette and idea name are irrelevant. Editing is a left-brain activity that is completely separate from idea generation. Keep it that way. First, let the ideas come out; sloppy and uninhibited. You’ll have chances to edit later.

**4. Thou shalt not execute.** The second an idea hits the whiteboard, you can become distracted by thinking about execution. You wonder: *how the idea would come to life. What would it cost? Who would run it? What would the project plan look like? What would be the financial implications? Where would the work take place? When would we begin?* Those are great questions for later;

avoid them at this stage. They are your left-brain in all its glory sneaking in and vying for a seat at the table. As important as such thinking may be, it will quickly crush your creativity. Keep it out of the room.

**5. Thou shalt not worry.** Fear is the single biggest blocker of creativity. It is pounded into us from childhood on. We learn in school that there is always one right answer and mistakes should be avoided at all cost. You need to release that fear to unshackle your true creative potential. If you’re leading the group, emphasize this before you begin. Tell colleagues that *every idea matters* and that the point of the exercise is to *get a lot of ideas on the board*. To create a culture where everyone feels comfortable taking risks and has no fear of embarrassment or negative consequences, set an example. Enable others to release their fears, so creative thinking can emerge.

**6. Thou shalt not look backward.** We can learn a lot from the past, but it can also *limit our ability to invent the future*. Holding back an idea because *we tried it once before and it didn’t work out well* is highly limiting. Think how much *the world changes daily*. An idea today comes into a world with new circumstances, market conditions, technologies and customer tastes. *If it didn’t work in the past, it may just have been ahead of its time*. Perhaps that idea, when revisited, will lead to a revised version that can carry the day. Every idea is new at this moment, so share every one that you believe has merit.

**7. Thou shalt not lose focus.** Idea sessions can easily dissolve into wandering. Don’t let it happen. An idea might remind someone of a story she

just has to tell. Or it might lead to taking on a different creative challenge, or discussing a completely different topic.

A right-brain creative state is so rare and so refreshing that its energy and excitement can cause a team to stray. To solve this, keep what I call a *parking lot list*. When unrelated topics come up, put them on the *parking lot list* to be discussed another time. This will keep the group focused on the task at hand while still ensuring that important concepts are remembered and get attention at a later date.

**8. Thou shalt not sap energy.** There are two kinds of people, *zappers* and *sappers*. When you’re with a *zapper*, you

feel energized. You become engaged, you lean forward, you feel stimulated, which is ideal for creative expression. *Sappers* drain your energy. Even if you’ve just had six shots of espresso, you want to fall asleep after speaking with them for five minutes. Just as you manage the clock or manage a budget, manage energy. The energy of the room can build,



unleashing brilliant ideas while everyone has a great time, or it can devolve into yet another boring, BlackBerry-checking, clock-watching drone session. Do everything you can to keep the energy up. High-fives, cheers and positive vibes for all. Don’t allow *negativity* and *energy-draining commentary* to suck life from the room.

**9. Thou shalt not compare.** Comparing ideas is *an insidious form of criticism* that needs to be checked at the door *with all other left-brain habits*. Comparing often contains an implicit criticism. *That’s like the idea Jim had last year*, sounds harmless, but not if everyone hated Jim.

**10. Thou shalt not make fun at others’ expense.** Brainstorming can become quite jolly, and it’s tempting to start joking about what comes up. But resist. Laughter at the expense of an idea is a fast way to kill it.

Follow these commandments assiduously to prevent brainstorming sessions from wasting time and producing only the same three safe—and useless—ideas the group had last time. Brainstorming is an immensely useful activity, but only if you use it properly. **SSE**

*Josh Linkner is author of Disciplined Dreaming: A Proven System for Breakthrough Creativity (Wiley/Jossey-Bass). Visit [www.joshlinkner.com](http://www.joshlinkner.com).*

**ACTION: Follow these tips when brainstorming.**

## Personality Collisions

### Overcome conflict in your work.



by Jack N. Singer

**M**ANAGING INTERPERSONAL conflict is among the most vital skills that you can possess, since *unresolved or insensitively managed conflict* negatively impacts productivity, morale, and the bottom line.

To resolve conflict, take **three-steps**:

**1. Evaluate your conflict management style.** Self-assessment can give you insight into how you react in conflict situations. The insight helps you understand what *buttons* get pushed when you are provoked.

**2. Identify conflict management behaviors.** When you experience conflict, you resort to behavioral habits. These reactions include: 1) *Non-productive behaviors*, such as confronting, dominating, defending, using sarcasm, hostile humor, repressing emotions, insisting on being right, stonewalling, and blaming; 2) *Neutral behaviors*, such as avoiding, cooling off, apologizing, and giving in or backing off to avoid confrontation; and 3) *Positive behaviors*, such as active listening, empathizing, disarming, inquiring, using “I feel” statements, and recognizing how your internal dialogue impacts your emotional reactions. The goal is to eliminate *negative* and *neutral* behaviors and practice *positive* confrontation reduction skills until they become habits.

**3. Learn seven powerful confrontation reduction skills.**

- **Active Listening.** Practice *genuine* listening, as opposed to *defensive* listening, where you plan your retort *while* the other person is talking. Paraphrase what the other person says in your words, without judging, agreeing or disagreeing. Listen to and reflect the content, needs and feelings of the other person. Ask for feedback to determine whether you interpreted correctly. Ask for clarification until you’re sure that you have heard what the other person is saying and how he or she really feels emotionally. You can then respond. The other person then listens and paraphrases for you. Continue until you both *clarify your positions* and are certain that the other person heard you and understands.

- **Empathizing.** Put yourself in the other person’s shoes; try seeing through his or her eyes, taking into account cultural, racial, gender, experiential differences.

- **Disarming.** The fastest way to defuse

an argument is to *find some truth in what the other person is saying*, even if you disagree with the criticism or complaint. Acknowledging the person’s feelings *without agreeing* with what’s said, opens the door to *clarification* and *reconciliation*.

- **Inquiring.** By asking for clarification of ideas, needs and feelings, you signal a *feeling of respect* and can work toward mutual understanding and compromise.

- **I Feel statements.** Expressing yourself by saying “I feel angry because you seem to be avoiding me” is more productive than the accusatory, “you made me angry and it’s your fault that I’ve had a bad day.” You take responsibility for your feelings and share them, rather than escalating the confrontation by blaming and putting the person on the defensive.

- **Internal dialogue.** Automatic thoughts,

including your assumptions and conclusions, cause emotional reactions and distortions. For example, you might say: “I should have gone to work despite being ill” (using **should**, **must**, and **have to** in judging your actions). Once you learn about the distortions, you can challenge them, create rational alternative thoughts, and dissolve negative emotions.

**Interpersonal conflict is healthy when it brings a rich sharing of ideas, mutual respect and an appreciation of diverse opinions, needs, and values.** Use confrontation reduction skills to enhance trust, creativity, and *the quantity and quality of your products and services!* SSE

Jack Singer is a speaker, trainer, consultant and author of *The Teacher’s Ultimate Stress Mastery Guide*. Visit [www.drjacksinger.com](http://www.drjacksinger.com), email [drjack@funspeaker.com](mailto:drjack@funspeaker.com).

**ACTION: Master confrontation reduction skills.**

## SALES/HONESTY

### Selling Honestly

Never lie to your prospects.



by Wendy Weiss

**Y**OU CAN SELL YOUR WAY OUT of a slump **by giving your prospects and clients honest value and communicating honestly with them.** There is no reason to ever lie to a prospect. Such tactics often backfire.

When gatekeepers ask, “What is this in reference to?” you need not blurt out all that you wish to discuss. Give them *the minimum information needed to put your call through*—often simply your name and company name. *Make your responses short and to-the-point.*

**In sales, honesty is always the best policy.** Once I spoke with a friend, Jane, an assistant dean at a business school. She had attended an event where she met an exhibitor with a service that she thought would benefit the school. She told the exhibitor that she would introduce the exhibitor’s sales rep to the decision-maker. Later she received a call from a rep of the company. Her secretary asked, “What is this in reference to?” The rep answered, “I’m returning Jane’s call.” Hmmmm . . .

Jane was happy to help this company make the right connection—until the rep lied to her. Jane was offended and would not speak to the caller.

**So what might this sales rep have said?** How about: “Please tell Jane that (rep’s name) from (company) is calling.” Or “Jane met (exhibitor’s name) at (name of event).” Or “I’m from

(company name.) Jane said she’d help us.” Jane would have recognized the company name and either taken the call or asked her secretary to convey the decision-maker’s name and contact info.

**Never lie to a prospect**, even if you are having a hard time reaching the decision-maker. Recently I asked a client what to say when a gatekeeper asks, “What is this in reference to?” One experienced sales rep suggested, “I’m not sure. I’m just returning the call.”

I’ve heard many variations on this response: “It’s personal.” “She called me.” “He asked me to call.” And on and on. Some responses are clever, and believable. Just one problem—they *aren’t true*.

These responses might get you in, but problems start when the decision-maker picks up—the person who knows that he did not call you, did not ask you to call him, and does not know you. With some fancy *mouth work*, you might get beyond your prospect’s irritation. Perhaps your message is so compelling that your prospect will engage with you.

Here’s my point: **You can reach decision-makers directly without having to lie.** Fictional responses may get you access, but they also might torpedo any chance of turning *prospects* into *customers*.

**Just say:** “Please tell (prospect’s name) that (your name) from (your company) is on the line.” If the prospect is available, you should get through. When prospecting, don’t lie, fudge the truth, or make up stuff. **Honesty is always the best policy.** SSE

Wendy Weiss, *The Queen of Cold Calling*, is author of *101 Cold Calling Tips For Building New Customers*. Call 866-405-8212 or email [Wendy@wendyweiss.com](mailto:Wendy@wendyweiss.com).

**ACTION: Never lie when making sales calls.**

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