Sales Best Practices

A six-part guide to landing the sale and growing your customer base.

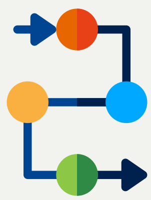
PART 1

Write It Down

GET THE FACTS

The Research

DEFINITION: Process documentation is “a complete description of a business process using words, images, and symbols to designate exactly how the process should function in an ideal environment.” *(Source: Kissflow)*



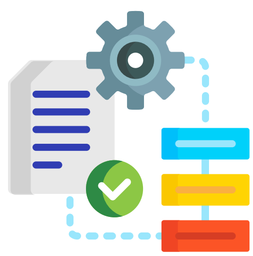
WHY BOTHER? “Process documentation acts as a best practice guide for how to build and execute” your processes. It’s a formal document telling the rest of the organization, ‘This is how we make Sales in our company.’”

(Source: Bizagi)

ACTION

The Game Plan

1. Think through every single step of your existing Sales process.
2. Write down your current Sales process.
3. If possible, create a visual representation of the Sales process (workflow, map, etc.)
4. Look for steps that you can eliminate (duplicates, unnecessary steps, etc.)
5. Think through all the people in the organization who NEED something from a proposal and WHAT they need!
   - ✓ Customers Service Representatives
   - ✓ Office Staff
   - ✓ Field Staff
   - ✓ Scheduling Team
   - ✓ Billing Department



6. Ask each person in these departments and who deals with fulfilling orders on a day-to-day basis, “What information do you need to complete your part of this process?” Build out the process around that information!

PRO TIP: Map out your workflow

Using tools like [Lucidchart] will help you visualize and organize your thoughts.

READY FOR MORE DETAILS? CHECK OUT: SINGLEOPS.COM/WRITE-IT-DOWN

PART 2

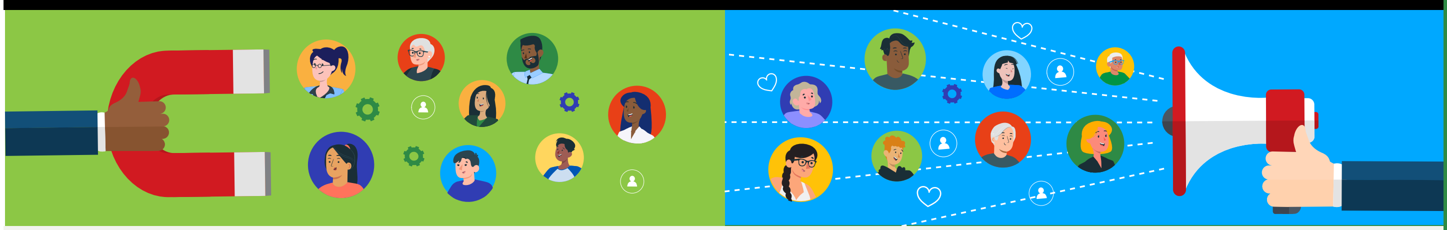
Where Do Leads Come From?

Inbound v. Outbound

THE RESEARCH

The Definition A lead is "a person who is interested in the product or service you sell." *(Source: LeadSquared)*

Difference between Inbound and Outbound?



INBOUND LEADS are "leads that initiate contact with you directly or through referral channels."

INBOUND LEADS INCLUDE form submissions on your website, phone calls to your business because they saw a yard sign or referrals from an existing customer.

OUTBOUND LEADS are leads "developed through proactive, direct contact initiated by you." *(Source: Medium)*

OUTBOUND LEADS INCLUDE stopping to talk to neighbors and door-to-door sales.

THE GAME PLAN

For Inbound Leads

1. You should also document your processes around marketing and track them to help with Inbound leads.
2. Learn to source leads more effectively. Don't just ask, "How did you year about us?" or you'll only get Last Attribution answers. Ask a more sophisticated question like, "Why did you call us specifically today?"
3. The point is to learn where your leads are coming from. If you don't know that, you can't replicate the results.

For Outbound Leads

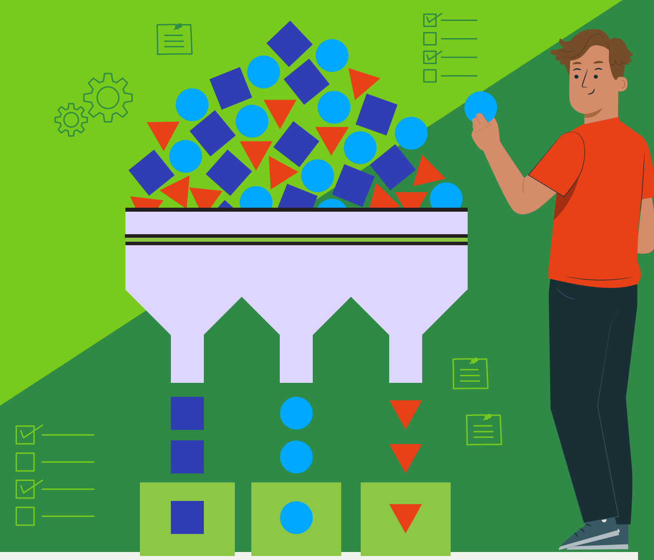
1. Outbound leads should be pursued when a company is young (open for less than five years) or when the timing is good (high wind events for Tree Care companies, for example).
2. Lawn Care companies can pursue outbound at just about any stage of growth.
3. Whatever you decide to do with Outbound, be sure you create a process and document it. This allows you to track what worked and what didn't and will enable you to scale the process.

READY FOR MORE DETAILS? CHECK OUT: SINGLEOPS.COM/INBOUND-V-OUTBOUND

PART 3

What To Do With A Lead?

Qualifying Leads



THE RESEARCH

The Definition Lead qualification is the process of assessing which potential customers are most likely to purchase your product or service.” *(Source: Chilipiper)*

Why Qualify Leads?

QUALIFYING LEADS “allows you to pursue the leads who are most likely to purchase the product, saving you time and energy.”
(Source: Hubspot)

It can mean the difference between a GOOD SALES MONTH AND A POOR SALES MONTH.
Source: Clickback

THE GAME PLAN

When to Qualify Leads?

LOW-RISK, LOW-SPEND items (think Lawn Care) probably **DON’T NEED** to be qualified since they can be sold over the phone.

HIGH-DOLLAR projects or projects where **TECHNICAL** expertise is required (professional pruning, design/build, etc.) **SHOULD BE** qualified before going to a property.

“THE BEST SALES QUESTIONS HAVE YOUR EXPERTISE WRAPPED INTO THEM.”
– Jill Konrath *Source: Zoominfo*

How to Qualify Leads?

- Consider implementing consultation fees for technical or complex projects. These fees weed out the “tire-kickers” and ensure serious buyers are present for appointments.
- Talk about budget. Don’t assume they read every page on your company’s website. Be sure the funds required for you to complete the project properly aren’t a roadblock.
- Identify decision-makers. Ensure they’re on-site for your visit. If not, take very detailed notes that you can reference when talking to the decision-maker.
- Build a referral network. There are people whose businesses serve clients in adjacent spaces. Maybe they want cheap, but you’re a high-end business. Build a relationship with the less-expensive landscapers in town, and refer clients back and forth. The customer isn’t necessarily looking for you. They’re looking for a solution.

READY FOR MORE DETAILS? CHECK OUT: SINGLEOPS.COM/QUALIFYING-LEADS

PART 4

Customer Experience

THE RESEARCH

The Definition:

"Customer experience is the internal and subjective response customers have to any direct or indirect contact with a company." *(Source: Harvard Business Review)*

Phrased differently, you can say customer experience is "the feelings people have when interacting with your company, whether they've become a customer or not."

Touchpoints:

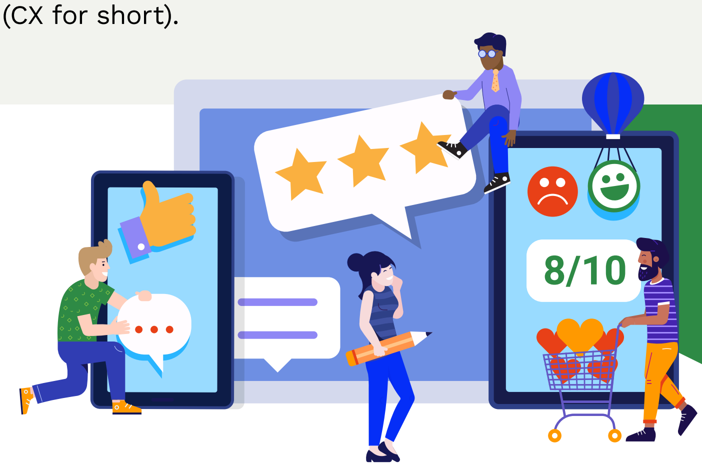
"Customer satisfaction is essentially the culmination of a series of customer experiences or, one could say, the net result of the good ones minus the bad ones." *(Source: Harvard Business Review)*

The net accumulation of these "touchpoints" creates a feeling in a customer or potential customer's mind. That net accumulation of touchpoints is called the Customer Experience (CX for short).

ACTION

The Gameplan

There are several resources available to you right now to help you start or improve your Customer Experience (CX) program.



ASK YOUR TEAM

Your current employees who are customer-facing (sales people, production team members, customer service reps, office staff, etc.) already know what parts of your process frustrate your customers. They're dealing with putting out those fires every day. Ask them for insight on areas to improve.

ASK CANCELED CUSTOMERS

Ask people who fire you why they fired you. It's painful feedback to hear, but they've got nothing to lose. The savvy business manager will take the patterns that emerge from this feedback and create processes that reduce that friction. This improves your retention and your bottom line.

SECRET SHOPPERS

Have someone you know and trust "buy" services from you. Ask them to give you honest feedback about every part of the process. Ask specifically about the timeliness of a response, interactions with sales, field, and office staff, how the experience with billing was, satisfaction with the overall job, even how your ads make them feel. Do this a couple of times each season, and begin to catalog the feedback to look for patterns.

BUYER PERSONAS

If you created Buyer Personas to help with your Marketing efforts, think about the type of experience those people would appreciate. Use that as a starting place to craft great experiences.

READY FOR MORE DETAILS? CHECK OUT: SINGLEOPS.COM/CUSTOMER-EXPERIENCE

Customer Experience (Cont'd)

PROPOSALS

Action Items specific to the Proposal part of your Customer Experience:

WINNING THE SALE

- **Call them back immediately:** Often the first company to contact a customer has an advantage. Structure your team in a way that allows them the maximum amount of flexibility to respond to inquiries.
- **Meet Them Face-to-Face ASAP:** Have as small a gap as humanly possible between that first contact with the customer and when a Sales rep gets to their home. You want to maintain the momentum of their excitement to start the project.
- **Get Them Proposals Quickly:** Again, this is about maintaining their enthusiasm for the project. If you have a long gap between the face-to-face meeting and when they receive a proposal, you'll lose traction fast.
- **Communicate:** If your proposal might take a while (large installs, construction, design/build, etc.) make sure you tell them how long it'll take. Contact them in the interim between the face-to-face meeting and the delivery of the proposal to assure them you're

REDUCE THE WAITING TIME

- The technology exists to help you cut down on this wait time between meeting with a client and being able to furnish them with a great proposal.
- A company like Groundwork allows you to do proposals virtually, getting them to customers much more quickly.
- Quantity surveys (also called takeoffs) can be outsourced to the professionals at Takeoff Monkey without a subscription and turned around in a day or two.

65% OF RESPONDENTS would become **long-term customers** of a brand if they can provide **POSITIVE EXPERIENCES THROUGHOUT THE CUSTOMER JOURNEY.**

Forbes Magazine, quoted by Emplifi

Companies that **improve their CX programs "INCREASE REVENUE 10-15%"** and **"LOWER COSTS 15-20%."**

McKinsey & Company, quoted by Chief Outsiders

READY FOR MORE DETAILS? CHECK OUT: SINGLEOPS.COM/CUSTOMER-EXPERIENCE

PART 5

The Sales Call

GET THE FACTS

The Research

"B2C companies understand that their customers are more likely to make impulse decisions...and require trust to establish loyalty." *(Source: Fabrik Brands)*

"B2B clients are more likely to conduct extensive research and a well-thought-out analysis of quotes they receive." *(Source: Kevin Shackleford)*

"Respect is one of the Keys to Building Trust." *(Source: Penn State)*

"Vicarious ownership" happens when people begin to obsess over the idea of having something. They build an emotional attachment to the object in their mind until they finally pull the trigger and make a purchase. *(Source: Psychology Today)*

ACTION

The Game Plan

BEFORE YOU ARRIVE

- Don't drive like a jerk—neighbors are watching.
- Park where you're not blocking the homeowner from exiting their garage or driveway.
- Also be conscious of not blocking driveways of the neighbors or fire hydrants.

ETIQUETTE ON THE PROPERTY

- Don't walk across the lawn. Use pathways until you've been given permission.
- If it's a B2B call, be sure to announce and introduce yourself to secretary or point of contact for the account before walking around the property.
- If the homeowner or property manager isn't available, leave something physically behind (business card, brochure, hand-written note with your cell, etc.).

THE INTRODUCTION

- Use the doorbell (knock if it's not working) to announce your arrival.
- Step back from the door so the person you're meeting with doesn't feel their personal space is being invaded the moment they greet you.
- If you're a large individual, turning slightly to the side helps; you'll appear less threatening.
- A firm handshake (or friendly wave if it's cold and flu season) is appropriate.
- Share the reason for your visit.



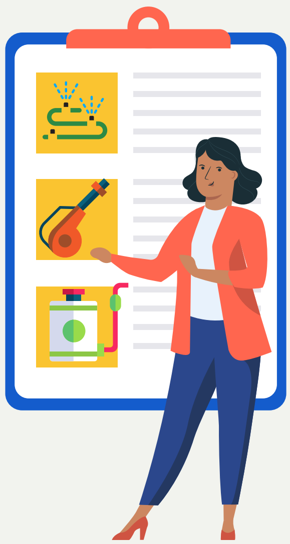
READY FOR MORE DETAILS? CHECK OUT: SINGLEOPS.COM/THE-SALES-CALL

PART 5

The Sales Call (Cont'd)

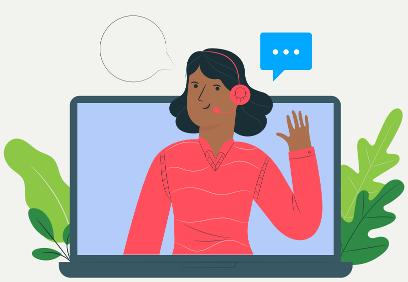
DISCUSSING THE PROJECT

- **Avoid Industry "Jargon:"** Explaining things in a way that uses some technical terms is okay to establish professionalism, (especially for B2B sales). But you also need to explain things in a way that the potential client can understand. Use everyday analogies they can quickly grasp to help them relate to difficult concepts.
- **Choose Your Words Carefully:** Avoid "buzzwords" that may evoke a negative response from your potential customer. Words like "chemical" and "kill" might really put some people off, so use them selectively and only to make a point.



AGREE ON NEXT STEPS

- If you're charging a design or consultation fee, make sure they know they'll be billed for this.
- Clarify all the details of what they're expecting from you and your company BEFORE you leave the property.
- As much as possible, get everything in writing. This reduces misunderstandings between you and the client AND in the handoff between Sales and Production.
- Be sure and ask how they want you to conduct follow-up: email, phone call, text message, etc.
- Take responsibility for the follow-up off the customer's shoulders. Tell them when and how you'll follow-up, and then do it.



FOLLOW-UP

- Investment in timely follow-up as a business is critical.
- If you're truly understaffed and your Sales people can't follow-up on their own time, consider hiring an administrative assistant or Inside Sales person to help.
- Also, make sure you're leveraging the automation features of any software you may be using in order to follow-up on your behalf.

READY FOR MORE DETAILS? CHECK OUT: SINGLEOPS.COM/THE-SALES-CALL

PART 6

Upselling & Retention

GET THE FACTS

The Research

IMPORTANCE OF RETENTION

"61% of consumers take their business to a competitor when they end a business relationship." *(Source: Wheelhouse Advisors)*

"Acquiring a new customer can cost five times more than retaining an existing customer." *(Source: Outbound Engine)*

"Increasing customer retention rates by 5% increases profits by 25% to 95%." *(Source: Harvard Business Review)*

IMPORTANCE OF UPSELLING

"The success rate of selling to a customer you already have is 60-70%, while the success rate of selling to a new customer is 5-20%."

"One customer experience agency found loyal customers are 5x as likely to repurchase, 5x as likely to forgive, 4x as likely to refer, and 7x as likely to try a new offering [compared to net-new customers]." *(Source: Outbound Engine)*

ACTION

The Game Plan

FOR CUSTOMER RETENTION

- ✔ Improve Customer Experience
- ✔ Communicate often and well. Without communication, our minds go to the worst-case scenario.
- ✔ Have a "cancel save" plan in place. Make sure all your customer-facing employees know this plan and are empowered to work to save a customer who is canceling services.
- ✔ Train team members to ask about the reason for the cancellation rather than offering a discount. Get to the real "pain point," and see if you can resolve that issue first.

FOR UPSELLING CUSTOMERS

- ✔ Identify services that go well together. Offer additional services that dovetail with the customer's original purchase. Extra service offerings should be adjacent to the reason they hired you in the first place.
- ✔ For example, offer PHC services to customers who have trees susceptible to invasive species, grub control to Lawn Care customers, or mosquito control to someone who recently installed a patio.
- ✔ Don't overwhelm customers with every service you offer. You'll only alienate them and sour the relationship. A good rule of thumb is that you shouldn't make a "hard" pitch for services more than six times per year on the phone and not more than three or four times via email.

READY FOR MORE DETAILS? CHECK OUT: SINGLEOPS.COM/UPSELLING-AND-RETENTION