Sales for techies and consultants

Getting assignments as part of your work

Dedicated to

all the people who taught us what is in this book: our clients, our participants, our colleagues, our trainers, and authors from whom we could learn.

and Frans van den Brink, merchant, and father of Jan Willem.

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Getting assignments as part of your work

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Content

Welcome to this book.

Working on a project that suits you greatly influences your day-to-day job satisfaction. Alongside factors like having nice colleagues, of course. So, an interesting question for techies, consultants and other subject matter experts is how to increase the chance of winning excellent assignments for yourself and your colleagues.

That, of course, sounds rather commercial, or salesy. And many content-driven professionals aren't exactly excited about anything that feels like sales or business development. Sound familiar?

It does to us. And not just from our own experience. At Dreamfactory we support subject matter experts such as technicians, consultants, engineers, trainers, lawyers and others in finding great assignments every day. And the majority don't see themselves as super salesy...

We wrote the first version of this book in 2010 for people just like that. And we're grateful for (and proud of) the many compliments we've been fortunate to receive. After twelve editions, it was time for a full revision and update, and for an English edition.

Over the past years, we've learned even more from the thousands of techies and consultants we've trained, coached, and supported in this part of their work. And we're happy to share those new insights. It's still just as important for professionals to take an active role in finding first-class assignments. That's why we're pleased to present the fully revised and expanded edition of *Sales for techies and consultants*.

This book offers practical tips to help you and your colleagues significantly increase your chances of winning great assignments, in a way that suits you.

We wrote it for Dutch professionals who combine doing the work with getting the work and who hate cold calling, or slick sales tactics. Just like us. In this translated version, we added an extra chapter on cultural differences in sales approach and language.

We wish you an enjoyable read, first-class assignments, and great clients.

Jan Willem van den Brink and Maarten van Os

Preface of the first edition in 2010

If someone had predicted at the beginning of our working lives that we would write a book about how to get clients, we would have laughed our heads off. Jan Willem worked as an ICT consultant and didn't like sales. Maarten worked in technology and did not have much acquisition to do. The assignments came naturally, or we left the selling to others. It would not have occurred to us that we would someday be helping others get clients.

Nevertheless, we have written this book with great pleasure. Our vision of getting assignments has changed quite a bit since then. Where it used to be a necessary evil, a somewhat opaque process and sometimes downright annoying, we now find it one of the most enjoyable parts of our work. In fact, we like it so much that we have also helped others to get better assignments.

Since 2000, we have been able to guide thousands of professionals in many organisations. We have trained and coached in very large and very small organisations and collaborated with professionals in many specialisations, such as lawyers, consultants, architects, IT specialists, engineers, trainers, and scientists. We processed the experiences we gained into this book.

Also, while studying roughly a metre and a half of books on selling, influence, advising and more, we regularly came across helpful tips and insights. We evaluated them in practice on ourselves, and then on our customers and students. And only if the theory worked in practice, did we include them in this book.

We now dare to call ourselves specialists in the field of sales for non-salespeople Despite that we are still learning on a daily - or at least weekly – basis.

We hope to pass on some of our passion for this beautiful field. And we ask you to smile when we, in our enthusiasm, give the impression that we know exactly how the world works.

All questions and comments are very welcome. You can contact the authors via www.dreamfactory.nl.

Voorburg, Summer of 2010

Jan Willem van den Brink and Maarten van Os

For whom?

This book is for techies and consultants. Professionals in (business) services who work for an organisation or are self-employed. People who are experts in a specific subject matter, who are not salespeople, but do need assignments in order to practise their profession.

Think of (technical) advisors, accountants, architects, lawyers, consultants, engineers, IT professionals and so on.

Most of our experience is with professionals who are part of an organisation, which is why most examples in this book relate to that group. But the same principles work just as well for the self-employed.

Are you a manager?

Most managers who lead teams of subject-matter professionals also have client conversations themselves, where the same principles from this book apply.

What we don't cover here is how you, as a manager, can further support your team in the commercial side of their work. Which is important if you want your people to contribute to the commercial process. We are happy to refer you to our Dutch book *Waarom Doen ze het niet gewoon – Zorg dat je consultants en techneuten opdrachtgevers vinden en tevreden houden*. Translated: *Why don't they just do it? Make sure your techies and consultants find clients and keep them happy*. It explains how, as management, you motivate, guide and kindly nudge your professionals.

Are you a consultant who is senior in commerce and do you want to teach this to others?

Then this book is also valuable. You will, subconsciously, already be applying much of the content of this book with good effect. Which is not the same as being able to convey the content to others. A good football player is not necessarily a good coach ...

Do you work in a non-commercial organisation?

It turns out that the lion's share of entrepreneurial behaviour we describe in this book, also applies to the public sector and in staff departments. Here too, a better relationship with internal clients is often desirable. Less *you-ask-we-deliver*. A tad earlier involvement in finding the business cases. Better alignment on content and budget before we get started.

If you substitute ‘internal client’ for ‘client’ in this book, most of the content will still be valid. Alternatively, you can just read another one of our books.

We use a few terms in this book that we would like to explain.

By a **professional** *we mean someone who provides substantive help to clients in their field. Nearly all the time this covers professional services. Think of a technician, consultant, environmental scientist, engineer, designer, project manager, copywriter, programmer, trainer, lawyer, etc. For this professional, getting assignments is a second discipline.*

By a **customer, or client** *we mean anyone who uses or is considering using the services of a professional. This could be an external client who will receive an invoice at some point. Or an internal client, i.e. A colleague may or may not be invoiced for services.*

By a **professional salesperson** *we mean someone whose job it is to sell, such as a sales manager, or account manager. For them, selling is their first discipline.*

Buying *instead of* **Selling**. *Our focus in this book is on helping the client (the buyer). Not on pushing our products and services. Therefore, we do not use the term selling conversation, (or a selling signal, agreement etc.) but a* ***buying*** *conversation.*

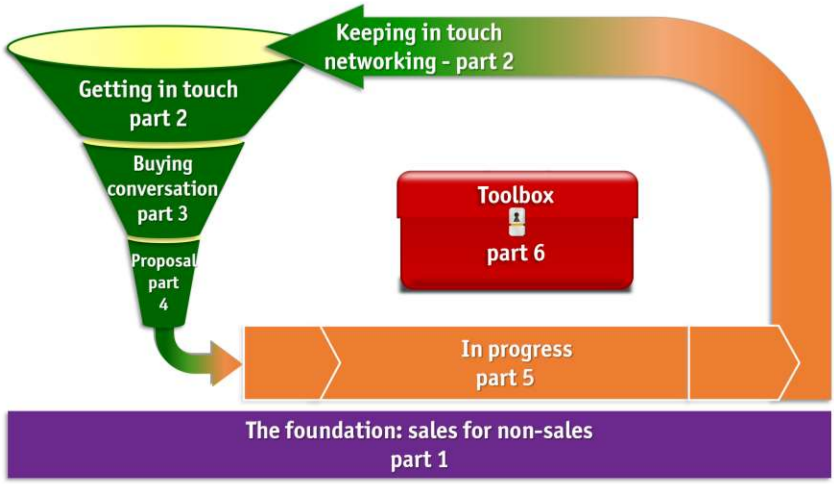
Are you a professional salesperson?

At Dreamfactory, we’re sometimes asked to coach ‘real salespeople’ as well. What stands out, generally speaking, is that while consultants tend to be a bit too cautious, salespeople are often just a bit too ~~pushy~~ brisk. So, although this book targets people for whom sales is a second discipline, in practice, ‘real’ salespeople also can benefit greatly. Especially the parts about the buyer focused conversation and the proposal are often very useful to them.

Which brings us to the question: what parts of this book are the most useful to you?

Reading Guide

What's inside the book? Here is the overview.



On the left side of the picture you see a funnel, also known as the 'sales funnel.' At the top is the *Getting in touch* phase. That's where you collect opportunities. You then have *a Buying conversation* and if both parties consent, you confirm this at the bottom of the funnel with a *Proposal*.

We then progress from sales to the delivery of the assignment. Each assignment has a start, a middle and an end. Those three moments each offer opportunities. After the assignment, it helps if you *keep in touch*, so that new opportunities roll into the funnel.

You will find these steps in the different parts:

- **Part 1 – Foundation**
  Many 'content' people are not exactly thrilled by words like business development, or sales. We address three obstacles: Dare, Do, and Discipline, and what you can do to ensure that you get clients in a way that is suited to you.
- **Part 2 – Getting in touch**
  First of all, it is important to connect with people whom you might be able to help with your services. You can do this in several ways, and keeping in touch with past clients is an important one.
- **Part 3 – Buying conversation**
  How do you develop from a client request to a good solution? What is the question behind the question, and how do you check whether the client has sufficient funds? And how does the decision-making process actually work?
- **Part 4 – Proposal**

A proposal often follows a good buying conversation. As far as we are concerned, this is a summary of the conversation, because otherwise you run the risk of ending up in a swamp of indecision. And what if a client wants to negotiate?

- **Part 5 – Work in progress**
  While conducting assignments, there are many moments where you can increase the chance of follow-up assignments, or additional work. Besides doing a good job, of course. What can you do at the beginning, middle and completion of a project to increase the chance of a new assignment?
  From the end of your assignment, the arrow goes back into the funnel, because you like to maintain network contact with your client and others. And so, you get back to the phase getting in touch in part 2, and then the circle is complete.
- **Part 6 – Toolbox**
  Communication skills are central to all phases of assignment acquisition. In this section you will find them listed.
- **Part 7 – Rather shameless Epilogue**
  Here you can read about whose giants' shoulders we could stand on when making this book. We advertise our other books, explain why we wrote this book, and give a peek behind the scenes of Dreamfactory. Do these guys practice what they preach?

Cultural differences

The original version of this book is in Dutch. And in the last 10 years, we worked more and more with internationally oriented companies, and we have met many different nationalities.

A lot of our participants ask us what the influence of distinct cultures is on the content of this book. Maybe because the Dutch have a reputation of being extremely direct or even blunt compared to many other cultures. That's why we have added an extra chapter to this book.

In order to keep the numbering of chapters in the Dutch and English books the same, we added chapter *7.8 Cultural differences* at the end of this book.

Maybe you would like to read that chapter first. Anyhow: when reading the examples in this book, please keep in mind that we encourage you to use language that suits you and your clients.

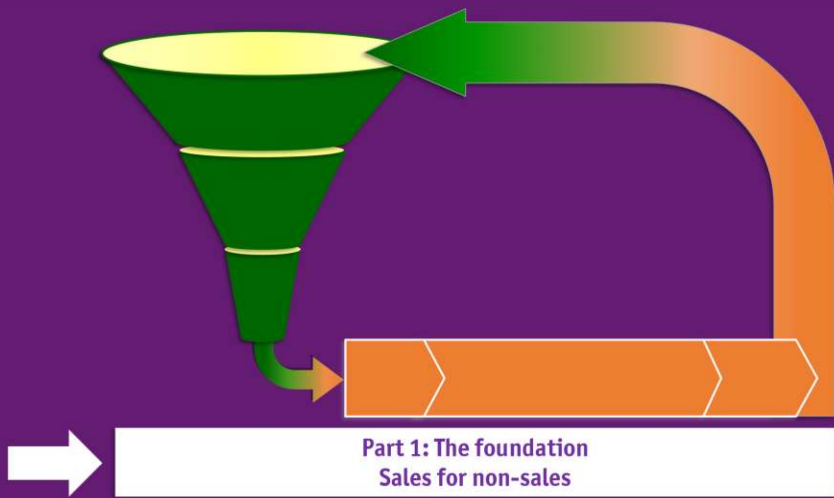
Awareness and choice

This book is about becoming aware and choosing. We hope to make you (re)aware of what you can do to increase the chances of first-class assignments and/or better client contact. Whether and how you do that, is of course your own choice.

We have collected lots of ideas in recent years, which appear to work in practice with many people in our target group. And it's not a one-size-fits-all, of course.

To make the book practical, we have included many sample dialogues. Undoubtedly, they often sound slightly different in your own setting. So, adapt those words to your own style and situation.

1 FOUNDATION



Many subject matter experts in (business) services are not immediately dancing with joy when it comes to the commercial part of their work. That's why we'll start with the question: why bother?

There is a difference between a ‘real’ salesperson and someone who has mastered a subject matter field and wants to find compelling and sufficient assignments.

The latter group (our readers) often encounters three obstacles, which we will discuss in this section:

- **Dare:** dealing with the unpleasantness that some people feel when confronted with acquisition. Among other things, we will cover:
  - That *no* is a completely okay answer, and why
  - How to overcome reluctance or mental blocks, while at the same time still remaining yourself
- **Do**: knowing **what to do** to increase the chance of a great assignment. What are the three easiest ways? And how to **do** this exactly?
- **Discipline** is important because you must pay attention in order to get good assignments, especially when they are not yet urgently needed. A simple plan with concrete actions helps with this.

And we explain why we’re firmly against cold calling.

1.1 Selling as a second discipline: why?

When it comes to getting assignments alongside your core expertise, an interesting question arises: *do I really need to play this role myself?* Because many people who are content experts agree that gaining assignments does not particularly suit them.

In many professions, there is a division between the people who can do something, and the people who can sell that 'something.' Selling that content themselves is something most people don't learn during their education.

In many organisations, sales and delivery are functionally separated. This also happens often in business services. An (account) manager ensures that there are enough assignments. The professional will act on whatever comes his way.

As an organisation, you could also hire an agency that does the cold calling for you: they do the phone work, stomach a large number of no's (which they don't take personally) and with the few yesses they schedule an appointment for an intake.

Outsourcing your acquisition can work just fine, especially for junior professionals. In ICT for example there are account managers who acquire the projects, on which they then deploy employees. As a junior lawyer, you will receive most of your cases from an associate, partner, or other senior.

And there are also reasons for choosing 'I wanna do it myself'. You can approach the reasons for that from three points of view:

- The client's perspective
- The professional's organisation
- The professional themselves

Jan Willem happily studied business administration in Groningen. Convenient for when you start your own business, you might think.

When the time came in 2000, he needed one more thing besides a product (training & coaching) and a fax machine: a client. Too bad; how to find a client had never been covered in the all six years of business administration...

Seen from the client's point of view

- Clients are people too. They prefer to do business with people they trust. And they often trust content professionals just a little more than salespeople.
- The client prefers to spar with a trusted advisor rather than with a salesperson who is less able to contribute to the content.
- Many clients want to know what stuff the professional they might engage is made of. They therefore prefer to talk to the person who will deliver the assignment, rather than with a salesperson, who only introduces the subject matter professional after, or during the intake. It also doesn't leave a strong or independent impression when a senior professional seems to need an account manager to hold their hand.
- It is frustrating when a client first explains the problem to a salesperson and then yet again to someone who actually has the in-depth knowledge. This takes time and causes annoyance.

When Jan Willem worked as a consultant at Pink Elephant, he was 'sold' by someone who specialized in selling, i.e. an account manager. At first, he was pleased. It meant that he didn't have to brag about or sell himself. He could also watch all money discussions comfortably from the sideline.

As he became more experienced, he noticed that the intake was a crucial phase of the project. It turned out that even the best account manager could not extract all the necessary information from the intake that he needed as a subject matter expert. He always had unanswered questions.

So, he usually had to repeat the intake after the official start of the assignment. This led to discomfort, dissatisfaction and sometimes some frustration for the client, the account manager and for himself too. After some time, he agreed with the account manager to take over the substantive part of the intake himself. The account manager would still take care of the opening and the financial section. Good for Jan Willem and for the client.

Seen from the employer's point of view.

More and more employers expect their professionals to play an active role in the acquisition of assignments.

- The employer wants sufficient turnover to keep the company profitable. Because professionals are the employers' eyes and ears it makes sense that they play a role in the acquisition of assignments.
- Assignments gotten directly by professionals are often more rewarding, which is good for the employee satisfaction.

- Many employers prefer not to be dependent on a few people who get all the assignments.
- There is often less pressure on rates on assignments that arrive via one's own network.
- In addition, professionals who acquire assignments themselves often have a good, high-level network relationship with the clients. Many employers would like to be in touch with their customers at an elevated level, such as in the role of partner, or *trusted advisor*.

Seen from the perspective of the professional

Most important are of course the arguments for the target group of this book: the subject matter professional. Why would it be worth it for him, or her? When we ask people this, different answers pop up.

- The chance of a fun assignment increases if you acquire assignments yourself. We regularly hear that professionals prefer to be at the helm when finding their next assignment. For example, to avoid the possibility of being asked to perform the same trick over and over. Or because this way they have a say in the work location, the type of industry, the organisational culture, or the social importance of an assignment.
- When for example your networking abilities improve over time, you will find that you will also grow in content. When you keep in touch with former clients, you will also learn what the long-term effect of your work is.
- When you secure assignments on your own, you can start at the very beginning — by understanding the client's needs. Many professionals prefer to collaborate with the client from an early stage. This is far better than coming in later, after someone else has already proposed a solution that might not be ideal.
- The ability to secure assignments enhances your career prospects within organisations. Professionals who can get assignments stand out in a positive way. They become seniors more rapidly and have an advantage on the job market. In organisations that more often apply the associate, or partner construction (such as law firms and consultancy firms), being able to get assignments yourself is an important skill needed to become an associate, partner, or managing consultant.
- In some organisations, the professional receives a financial bonus when securing an assignment himself. Although most professionals

don't really let themselves be guided by this, it's still not a bad thing to receive some extra appreciation.

- In time many professionals find getting their own assignments a very enjoyable part of their profession. They are able to help their clients, help their own organisation, have a more personal relationship, and improve their own skills as well.
- If you are a professional who works, or wants to work independently, the extent to which you can get assignments determines a large part of your commercial success.

In short: If you, as a professional, can develop your skills in finding assignments, then this will be a worthwhile expansion of your work activities. You can establish an even better connection between your field of expertise and the result it brings your client in practice.

Before we get into how you can grow in this, there is a well-known way of getting assignments we are going to discourage you from using.

1.2 Cold calling? We don’t go there!

Cold calling, or cold acquisition means approaching someone you don't know. You call, text, or write to people via an address file, or a Google Search, and you try to make an appointment to get them interested in your services. Cold calling is also having to deal with getting a call in the evening around dinner time from a nice lady who offers you ‘free mortgage advice.’ Or when an enthusiastic young man in a flashy blazer, rings your doorbell and promises an equal amount of energy for a lot less money. If you join that other energy company today, the one with the trendy name.

Selling is not the same as cold calling.

For many people, the terms sales and cold calling are somehow connected to each other. When people say: ‘*I'm not much of a salesperson*’ they often mean that they don't like to harass people uninvited. Which is understandable.

Cold calling is just *one* way of selling. And for our target audience just about the least fun and the least effective. You can be very good at getting assignments without ever having placed even one cold call. Cold calling is therefore not the same as selling.

Why doesn't cold calling work for our target audience?

With cold calling, you step outside your network. You approach people you don't (or hardly) know at all. This approach will increase your sales area. Many books about sales therefore recommend that you call as many strangers as you can. Fifteen minutes a day to fill the pipeline.

However, we do not recommend cold calling for professionals for two reasons.

- A lot of people rather hate this approach. It's just no fun at all. Not for the client and not for the professional.
- It is a lot of work for little result. You are shooting in the dark. The reasoning is as follows: making 300 contacts may result in 20 appointments, of which 12 are ultimately kept. Of these, six may prove promising and lead to a proposal, with only one or two proposals being accepted. This process involves a significant amount of rejection and considerable effort – especially considering that most content professionals have only a limited number of hours per month available for client acquisition.

Where do the best projects come from?

The best assignments often come through word of mouth. Through a satisfied client, who requires your services again. Or who refers another client your way. In other words, through the existing warm network.

Are we against all types of phone calls? Sometimes we see our clients turn pale when we proclaim in a training that we don't believe in cold calling. The rest of the group often sighs in relief.

For the exceedingly small group of people who do like this kind of cold calling, our advice is to first make sure you have a really good offer for a selected group of clients.

So never: Good afternoon, are you perhaps still looking for an engineering firm?

But it might be: Many organisations like yours are struggling to comply with the new rules and regulations, finding ways to make their buildings, and working methods truly sustainable, without the costs going through the roof. As of this year we have a new product on the market, which has been especially developed for...

And again: only do it if this way suits you. We personally never do calls like these.

Ehhh, but you still need new clients from time to time right?

Yes definitely, and in our experience, you get them by keeping in touch with your network. Because those people will also change employment from time to time. Or they know other people they want to introduce you to.

In chapter 5.6 *Asking for referrals* you can read how, especially towards the end of your assignment, you can increase the chance of your current clients helping you look for new contacts and clients.

Then there's also an often-forgotten group: your dormant clients. With whom you did good business a long time ago and whom you have somehow lost sight of. More about this in chapter *2.11 Reconnecting with dormant clients.*

Situation	Suitable sentence
You know there is a colleague available in whom you have full confidence.	I know Piet, and I think he is the right person for this assignment. I think he's good and I think he can help you. Could you use his help?
You know there is a colleague available who fits the profile, but you haven't worked together often enough yet to recommend him content wise	I know Arend. I think he should be able to do it, and I am not sure because I haven't worked with him on this subject before. Would you like to meet him to discover whether there is a good match?
There is probably someone like that within your unit or organisation. However, you have no idea who that would be and therefore do not know whether this person is suitable.	I don't know anyone who fits this profile. I expect that within our organisation a good one can be found. If you want, I can find out if we have someone who can do this. Does that seem useful to you or not?

A buying signal from someone you don't know yet

Sometimes you notice a buying signal coming from a little further away. For example, you hear there is a problem somewhere in the client's organisation with which you could help. But you don't know whom to contact for that.

Suppose you are doing an assignment in department A with Annet. And you hear that there is a problem with software testing in department B in the Breda venue. You don't know anyone in department B, but Annet probably does. Here also, the combination of IMI and pull questions works.

> Introduce: *Annet, I want to run something by you. I heard at lunch there are problems with software testing in Breda at department B. (shut your mouth for a moment)*
>
> Annet: *eh yes, that's what I also understood at the last MT meeting...*
>
> Motivate: *Yes, which is of course annoying for B. As it happens, we have a lot of experience with software testing, and my colleague Charly is a troubleshooter for those kinds of problems...*
>
> *Of course, I don't know the situation at all, and I thought that if you have a problem there, we might be able to help with, I would at least like to think along with you...*
>
> Instruct: *So, would it be interesting for you to know more about that?*
>
> Annet: *Um, yes, that sounds good, I guess. Of course, I don't know, my colleague Bert is in charge there.*

Consultant asks a pull question: *Yes, I understand. And how could we find out whether or not it is useful for Bert to talk to Charly?*

Annet: *Well, I'd have to ask Bert... I'll be seeing him in the MT meeting next Wednesday...*

Consultant*: That sounds good, and do you need anything from me or Charly that could help you?*

Annet: *Um, I think a resume would be helpful...*

A buying signal gets stuck in between yes and no

What if, on the one hand, a client is enthusiastic, and on the other hand, just doesn't get specific?

With a buying signal the following applies: *Yes is hurray and No is okay. Anything in between is not the right way*. In other words: we are happy with a yes, we can live with a no, but those loose ends we at some point still have to deal with, we prefer not to have too many of.

What often works here is *Naming What Is*. Just tell them what's going on. Whereby you explicitly indicate that a no is absolutely okay. What is not okay is that an action on a to-do list is endlessly postponed by a week or a month.

It might sound like this:

> Consultant: *Ed, we were talking a while ago about an issue with the new legislation you are having. And then you discussed it in the MT...* (shut your mouth for a moment)
>
> *That was a few weeks ago now. So, I was thinking, what are we going to do with that? Maybe the subject is no longer relevant, or no longer topical, or our help is not needed after all. And that is of course fine, then we will abandon the idea. And if it is still relevant, then it seems timely to take the next step, so we can investigate whether we can help you with this or not. What do you think?*

Then Shut Your Mouth again, until Ed responds. You may conclude it is not a good idea after all, and then there is nothing to worry about. And if it turns out to be a good idea, then a few pull questions can lead to a new plan from Ed.

> Ed: *Yes, I do think it's a good idea. It's just been very busy lately...*
>
> Consultant: *Okay, good to know. And what would be a good next step?*
>
> Ed: *Um, I actually think the best thing to do is to contact Harriët directly about that...*
>
> Consultant: *That makes sense, yes. And what do you think is the best way to do so?*
>
> Ed: *Shall I check the calendar right away when she would be available?*

Of course, the goal is not to annoy Ed with three pull questions in a row. The goal is to ensure we are getting somewhere, either in one direction or the other. And Ed has more commitment when he makes his own decisions while doing so. Also see chapter *6.5 Push or pull.*

Yes is hurray and No is okay.
Anything in between
is not the right way.