Aligning Customer Teams™

Building high performing customer teams

RED BEAR
NEGOTIATION CO.

Aligning Customer Teams™

A common scenario:

For many companies, selling has dramatically changed over the past two decades. Where it used to be that one individual was responsible for selling activities, today selling is often the charge of a team comprised of sales professionals and specialists who must coordinate their sales efforts across product/service lines, selling to customers through an integrated sales approach. Even when formal sales teams do not exist, it is necessary to coordinate efforts across multiple sales roles.

In these situations, selling depends on your organizations ability to marshal its resources effectively across a range of buying locations, buying influences, product lines, and internal organizational boundaries. Coordination in these type of shared account situations affects organizations in several ways ranging from expense-to-revenue ratios, the ability to retain current business or develop new business at these accounts, and salesforce morale and management. Yet, as many sellers will tell you, coordination is not easy.

What makes sales team coordination so difficult?

Not surprising, it's usually not any one factor that inhibits effective sales team coordination. Our research has shown that there are usually several factors at play. For example:

- Misaligned goals and priorities – the individuals involved have conflicting (or no goals at all) and focus on the activities that impact how they are measured and rewarded
- Communication – lack of information flow to the right individuals at the right time (often compounded by having team members who are geographically dispersed)
- Turf wars – unclear governance and power issues around who "owns" the account, communicates with the client, and has the final "say so" on what actions should be taken
- Lack of a clear, unified, explicit and integrated selling strategies that provides role clarity and leverages the expertise of each team member
- Accountability – holding team members accountable for actions and follow up when there is not one clear leader on the team that has authority to "direct" others.

What can be done? Introducing Aligning Customer Teams™

Aligning Customer Teams™ is a 2-day, highly interactive development program that provides sales team members with the skills, tools, and behaviors they need to enable better engagement, coordination, and execution of selling activities. Over the course of the program, participants are put into a series of metaphorical and common company-specific scenarios where the participants face the same challenges that they encounter when working with colleagues to sell and service your clients. Within these scenarios, they are asked to apply the concepts from Aligning Customer Teams™ and practice "what to do and say" when working as a team in order to contribute to the sales effort more efficiently and support the overall goals of the team and their organization

Aligning Customer Teams™: Key Concepts

Styles – Four communication styles *(thinker, feeler, sensor, and intuiter)* that demonstrate different values and perspectives. Participants learn how to adjust their communication, so it complements the style of other team members

Principles – Four Aligning Customer Teams™ principles:

1. *Maintain mutual esteem* of everyone on the team. This makes it more likely that all parties will engage openly.
2. *Maximize information flow*, which ensures that all relevant data about the customer, sales opportunity, and situation is shared. This, in turn, makes it easier for all parties to contribute ideas and perspectives.
3. *Foster creative solutions and* generate the most innovative approach to meeting customer needs and solving problems.
4. *Focus on the higher business purpose*, consciously redirecting the focus from narrow, parochial interests to shared customer and team goals.

Aligning Customer Teams™: Key Concepts

Behaviors – High performing team members apply the key cooperation skills of drawing out and trying to develop the best possible action plans for a given situation. They also use the conviction skill of expressing assertively when too much cooperation is present. Specifically, they demonstrate the ability to:

- *Express Their Ideas, Needs/Wants, and Feelings*, which helps communicate what they want and need from the situation;
- *Ask Questions*, which helps uncover information, especially about underlying needs that other parties may have;
- *Test for Understanding*, which helps show they understand what has said and builds better relationships between individuals; and
- *Confront and Clarify Differences*, which helps clarify what has been resolved/agreed to, and what differences remain, in such a way as to keep the dialogue moving forward to generate creative solutions.

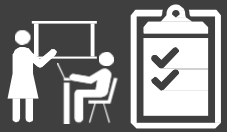
Contention Meter – A visual tool that helps participants recognize when they or other members of the team are in the zone of "creative contention" (i.e., engaged) or disengaged.

Team Planner – A planning tool that helps participants plan for applying the Aligning Customer Teams™ concepts in upcoming critical interactions with peers, customers, and team members.

The Learning Approach

Discovery learning. Participants learn by doing. More than two-thirds of the program is spent in actual simulations, followed by structured debriefings in which skill-building needs are identified and addressed.

Extensive feedback. During the program, participants receive verbal feedback from peers and their instructor.



Application planning. Participants periodically pause during the program to document how they plan to apply what they have learned to actual contentious situations.

Aligning Customer Teams™ Workshop Agenda

DAY 1

- Workshop Introduction
- Discussion: Customer Team Challenges, Wrong Turns, and Consequences
- Exercise: Building Awareness for How We Handle Tough Team Issues
- Exercise: Understanding the Dynamics of Team Contention
- *Discussion:* The Customer Team Performance Principles
- *Team Application Plan*

LUNCH BREAK (45 min)

- Introduction: Customer Team Member Styles in Contention
- Discussion: Your Styles Profile
- Exercise: Working Constructively With Team Members Who Have Different Styles
- Team Application Plan
- Discussion: Putting the Principles to Work
- Introducing the Behaviors
- Practice: The Express Skill
- Team Application Plan and Homework Assignment

DAY 2

- Discussion: Using New Team Skills to Improve Customer Service
- Practice: The Draw Out/Play Back Skills
- Exercise: Giving and Receiving Feedback
- Exercise and Discussion: Reframing
- Discussion: Planning for Customer Team Interactions
- Planning for Final Simulation

LUNCH BREAK (45 min)

- *Capstone* Case Simulation: Putting It All Together
- Final Simulation: Putting It All Together
  Assessing Your Team's Readiness to Succeed With The Customer and Taking Action to Improve It
- Wrap-Up and Evaluation

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About RED BEAR Negotiation Company

RED BEAR Negotiation Company is a global leader in business-to-business negotiation training. Our discovery-based learning approach, first developed by BayGroup International, empowers sales and procurement teams to negotiate more profitable agreements and build stronger relationships with clients, suppliers, and colleagues.

Visit us at: www.redbearnegotiation.com