AWT
ASSOCIATION OF WATER TECHNOLOGIES

# Training Seminars

Sales Training 2023 – Section 4

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AWT TRAINING Seminars

## "How To" Sales Course Drag Race

**Burn Out!**
Why Sell, What sales is, exploring why some are successful and why not, understanding yourself, and what your are selling. Discovering who you are in the marketplace and how to take advantage of that


**Launch**
Sold accounts, losing sales, next steps, I understanding the importance of Sales, Why it's called professional selling. Advanced Sales, Competition, understanding your personality profile and the people around you, the sales pyramid,.

**Staging!**
Finding leads, getting a face to face, having everyone provide the same message, steps of the sales process, survey, proposals, follow up, presentation and closing.

**FINISH LINE!**
Sales tracking/metrics/scorecard, setting goals, time/territory management, value related sales, advanced closing, losing/saving accounts

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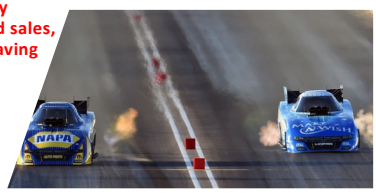
AWT TRAINING Seminars

## "How To" Sales Course Drag Race

- **FINISH LINE!**
- Sales tracking/metrics/scorecard, setting goals, time/territory management, value related sales, advanced closing, losing/saving accounts

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## HOW DO YOU KNOW YOUR PRODUCING?

- METRICS
  - *Expectations vs Deliverables*
- You are left alone
- Everyone knows you are doing well
- Living company values and standards
- Customers Stay with you and continue to upgrade



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## TRACKING

**Tools:**

- *Pipeline Deals*
- *Microsoft Dynamics*
- *Sales Force*
- *Other CRM's*

**Metrics:**

- *Contacts*
- *Address*
- *Type of service*
- *Price*
- *% to close*
- *Stage*
- *Start Date*



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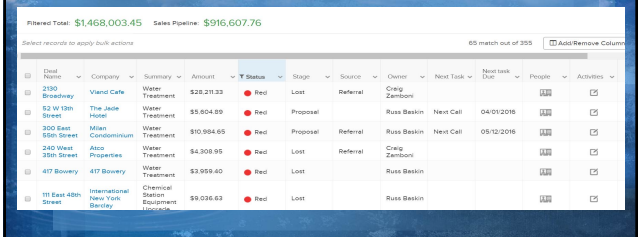
## TRACKING



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## WATER TREATMENT SALES METRICS

- *$ Or Number of Proposals made and sold*
- *Number of new contracts/ customers*
- *Number of follow ups per ____*
- *Number of leads per ____*
- *Average size customer (Sales, Tons, HP etc.)*
- *Average time to close a sale*
- *Payment Metrics*



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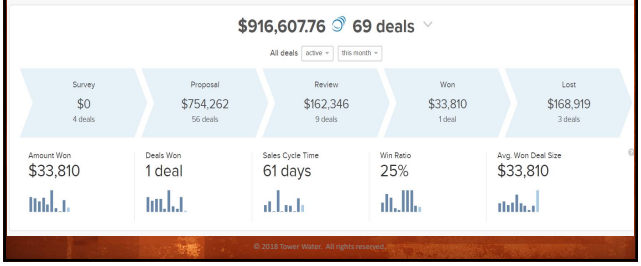
## METRIC TRACKING



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## METRICS

***Do you know what is expected?***

***Weekly, Monthly, Quarterly, Annually, Year after Year***

***Examples Do you have::***

- ***Reporting responsibilities?***
- ***Account responsibilities?***
- ***Account receivable expectations?***
- ***Annual planning responsibilities?***



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## SCORECARD

| Weeks | Goal | 1 | 2 | 3 | 4 | 5 | 6 | Average | total |
|---|---|---|---|---|---|---|---|---|---|
| | | | | | | | | | |
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## SCORECARD

| Weeks | Goal | 1 | 2 | 3 | 4 | 5 | 6 | Average | total |
|---|---|---|---|---|---|---|---|---|---|
| Leads obtained | 3 | 2 | 2 | 3 | | | | | |
| Follow ups | 12 | 18 | 25 | 17 | | | | | |
| $ in proposals | $10,000 | $12500 | $13200 | $9600 | | | | | |
| $ sold | $2,500 | $5400 | $22300 | $13450 | | | | | |
| Clients Sold | 1 | 1 | 2 | 1 | | | | | |
| Seminar | Decide topic | Gather info | Secure venue | Produce ppt | Finalize ppt | Practice seminar | Lead seminar | | |
| Current Client leads | 1 | 2 | 1 | 3 | | | | | |



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## Interactive #11

**Metrics - Building Your Scorecard**

- Give the scorecard chart
- Write a list of what you believe you are responsible for:
  - How much dollars in sales?
  - How much new business?
  - How many (New) service accounts?
  - How many lost accounts?
  - How many leads/week?
- It will be your decision whether or not to share to your organization



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**Interactive #11**
**Metrics - Building Your Scorecard**

| Weeks | Goal | 1 | 2 | 3 | 4 | 5 | 6 | Average | total |
|---|---|---|---|---|---|---|---|---|---|
| | | | | | | | | | |
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## WHY DO YOU NEED THIS?

*SALES = What have you done for me LATELY?*

*Look back is very short <1 year*

*Non-producers are not kept to long*



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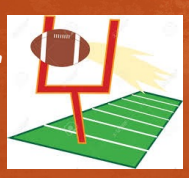
## GOAL SETTING

### PROFESSIONAL

- *Be the #1 or #2 Sales Person*
- *Have $ ____ in Pipeline*
- *Achieve ____ status*
- *"Winners Circle" - Trip etc.*
- *Exceed all Metrics*



### PERSONAL

- Buy a home
- Have a child
- Make 2 Friends
- Excel at your hobby
- Take 2 Vacations
- Make $ ____

***OBTAIN CWT***



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## GOAL SETTING

- **Company Metrics:**
  - Sell $150k – Q1
  - Sell 10 customers – Q1
  - Bring in 65 leads – Q1
  - Maintain 1,500,000 in proposals
- **Individual Metrics:**
  - Bring in 100 leads
  - Maintain 2,000,000 in proposals
  - Follow up 20 leads per week
  - Set up a seminar
  - Work with current clients ask them to give us leads



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**Goal Setting**
**Homework #1**

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Personal Goals for 2019 and 2-5 years
Professional Goals for 2019 and 2-5 years
Can be a part of a goal.

Details
- How do you picture them, add photos
- How will you achieve them – what does done mean?
- How will you track them – graph, chart, bar, etc.
- Where do you celebrate successes – not just at the end (milestones)



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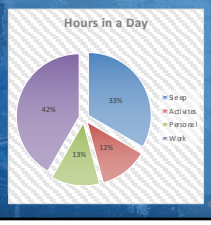
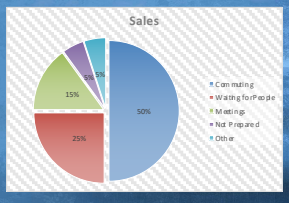
## TIME AND TERRITORY MANAGEMENT

### TIME (Can we manage it?)

- We all have same amount




### TIME WASTERS



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## HOW TO GET TIME BACK!

- *Minimum windshield time, take public transportation*
- *Verify all appointments in advance*
- *Text when you are on your way*
- *Schedule all meetings*
- *Company meeting should be same time and date each week*



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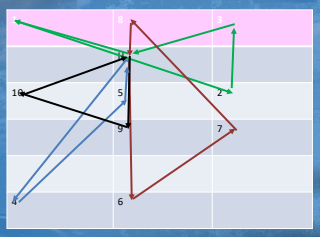
## TERRITORY MANAGEMENT




Over Lap means wasting time



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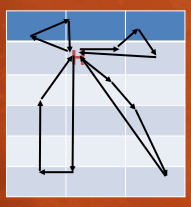
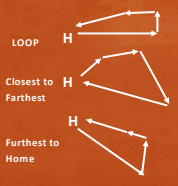
## TERRITORY MANAGEMENT





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## HOW CAN THIS HAPPEN?

1. *Schedule - certain area on a certain day*
2. *Tell prospects which day and around what time you will be in the area*
3. *Start early – bring coffee*
4. *Eat lunch - same time or with your prospect*
5. *Schedule only in small gaps between clients*
6. *Always schedule and confirm appointments*
7. *Consider overnight, especially when areas overlap*
8. *Schedule Service to fill in sales gaps*



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## VALUE RELATED SELLING

- *Value Companies – sell on value, NOT PRICE*
  - *Usually More*
    - *Technical*
    - *Work involved*
    - *Better results*
    - *Costly*



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## HOW TO PROMOTE VALUE?

- *Always ask who your competition is?*
- *Offer lease options for equipment to reduce pricing*
- *Offer to write the specification for the bid to get what they want (decision maker)*
- *Offer to review all the bids and compare*
- *Offer higher priced/value competition, in place of lower price non-valued companies*




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## SPECIFICATION WRITING

- *Include what makes your service unique*
- *Use statements to preclude competition from giving a low price, so they can't make it up on extras throughout the year.*
- *Include volumes, make up water etc.*
- *Specify equipment so you know everyone is bidding same*
- *Build a formal pricing sheet so that everyone must submit*



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## Formal Bid Document

**Main Condenser Water System Volume= gallons Estimated Annual Make up = gallons**

| Chemical Name | Type | Monthly Additions | ppm | Annual Lbs | Delivered $/lb | Total | Cost/1000 gallons |
|---|---|---|---|---|---|---|---|
| | Inhib/Dispersant | 0 | 0 | 0 | 0 | $ - | $ - |
| | Dispersant | 0 | 0 | 0 | 0 | $ - | $ - |
| | Oxidizing | 0 | 0 | 0 | 0 | $ - | $ - |
| | Non-Oxidizing | 0 | 0 | 0 | 0 | $ - | $ - |
| | Bio Dispersant | 0 | 0 | 0 | 0 | $ - | $ - |
| | | | | | Total Condenser Water Chemical | $ - | |

**Closed Loop Systems : gallons total Make-up gallons**

| Chemical Name | Type | Annual Additions | ppm | Annual Lbs | Delivered $/lb | Total | Cost/1000 gallons |
|---|---|---|---|---|---|---|---|
| | Inhib/Dispersant | 0 | 0 | 0 | 0 | $ - | $ - |
| | Non-Oxidizing | 0 | 0 | 0 | 0 | $ - | $ - |
| | Inhib/Dispersant | 0 | 0 | 0 | 0 | $ - | $ - |
| | Non-Oxidizing | 0 | 0 | 0 | 0 | $ - | $ - |
| | | | | | Total Closed Loop Water Chemical | $ - | |

Chemical Costs | EquipmentService Costs | Summary



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## Formal Bid Document

**Service / Equipment Costs**

**Annual Equipment, Parts, Test Kits, Reagents etc.**

| Qty | Description | Price/unit | Extended |
|---|---|---|---|
| | DOH Test Kit | $ - | $ - |
| | Other Parameter Test Kit | $ - | $ - |
| | Dipslides | $ - | $ - |
| | | $ - | $ - |
| | | $ - | $ - |
| | | $ - | $ - |
| | | $ - | $ - |
| | | $ - | $ - |
| | | $ - | $ - |
| | | $ - | $ - |
| | | $ - | $ - |
| | Total | | $ - |

**One Time Equipment Costs**

| Qty | Description | Price/unit | Extended |
|---|---|---|---|
| | | $ - | $ - |
| | | $ - | $ - |
| | | $ - | $ - |
| | | $ - | $ - |
| | | $ - | $ - |
| | | $ - | $ - |
| | | $ - | $ - |
| | | $ - | $ - |
| | | $ - | $ - |
| | Total | | $ - |

**Annual Service Fees / Rental Charges**

| Qty | Description | Price/unit | Extended |
|---|---|---|---|
| | 90 Day DOH Inspections | $ - | $ - |
| | 90 Day Legionella Testing | $ - | $ - |
| | Semi-Annual Disinfection (Biocide add o | $ - | $ - |
| | Semi-Annual Disinfection (6hr @ 5ppm ( | $ - | $ - |
| | Annual NYCDNYS Tower Certification | $ - | $ - |
| | Tower Cleaning (Straight Time) | $ - | $ - |
| | Full Glycol Analysis (21Parameters) | $ - | $ - |
| | | $ - | $ - |
| | Smart Controller Rental | $ - | $ - |
| | | $ - | $ - |
| | | $ - | $ - |
| | | $ - | $ - |
| | Total | | $ - |

**One Time Service Costs**

| Qty | Description | Price/unit | Extended |
|---|---|---|---|
| | Cooling Tower Water Management Plan | $ - | $ - |
| | | $ - | $ - |
| | | $ - | $ - |
| | | $ - | $ - |
| | | $ - | $ - |
| | Total | | $ - |

**Other Costs if Required**

| Qty | Description | Price/unit | Extended |
|---|---|---|---|
| | Twice Monthly Service | $ - | $ - |
| | | $ - | $ - |
| | | $ - | $ - |
| | | $ - | $ - |
| | | $ - | $ - |
| | Total | | $ - |

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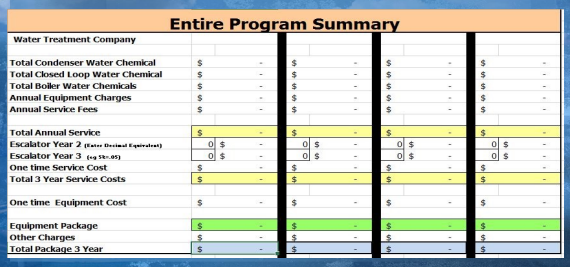
## Formal Bid Document



**Entire Program Summary**

| Water Treatment Company | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| Total Condenser Water Chemical | $ | - | $ | - | $ | - | $ | - |
| Total Closed Loop Water Chemical | $ | - | $ | - | $ | - | $ | - |
| Total Boiler Water Chemicals | $ | - | $ | - | $ | - | $ | - |
| Annual Equipment Charges | $ | - | $ | - | $ | - | $ | - |
| Annual Service Fees | $ | - | $ | - | $ | - | $ | - |
| Total Annual Service | $ | - | $ | - | $ | - | $ | - |
| Escalator Year 2 (Rate Period Equivalent) | 0 | $ - | 0 | $ - | 0 | $ - | 0 | $ - |
| Escalator Year 3 (eg 5%=.05) | 0 | $ - | 0 | $ - | 0 | $ - | 0 | $ - |
| One time Service Cost | $ | - | $ | - | $ | - | $ | - |
| Total 3 Year Service Costs | $ | - | $ | - | $ | - | $ | - |
| One time Equipment Cost | $ | - | $ | - | $ | - | $ | - |
| Equipment Package | $ | - | $ | - | $ | - | $ | - |
| Other Charges | $ | - | $ | - | $ | - | $ | - |
| Total Package 3 Year | $ | - | $ | - | $ | - | $ | - |



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## ADVANCED CLOSING

- *Hard – due to pain of rejection*
- *Ask for acceptance all the way through*
- *Always close a deal in person*
- *Time based:*
  - *Strike when the prospect can say yes; it will put them at ease, release the tension.*
  - *"push" – they want to be convinced!*
- *You control the tension*
  - *What can happen if they don't accept your proposal?*



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## TYPES OF CLOSES

### Moral and Ethical Closes?

1. Direct Close: *Are you ready to place the order?*
2. Level with Me: *Have I failed to show you the value in our service?*
3. Ben Franklin: *Build a pros and Cons list*
4. Solicit Objection: *Is there any reason we can not proceed with this proposal?*
5. Impending Event: *We have a team in your area next week, what day can we schedule?*
6. Assumption Close: *Circling everything they must have in your proposal, now all they need is to sign.*
7. Snap Angle Close: *Customer asks for a concession. If I can do this today will you sign the contract?*
8. Puppy Dog Close: *Let them test drive something they wont be able to live without.*
9. Take Away Close: *Remove a value to reduce a price and make the sale.*



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## LOSING ACCOUNTS

*IF YOU LOST A SOLID & PROFITABLE ACCOUNT*
*YOUR RELATIONSHIP WASN'T RIGHT*

DO YOU :

- *Top Down Communicate with decision makers*
- *Bottom up Communicate with all influencers*
- *Perform Annual Reviews*
- *Look for constant ways improve the account*
- *Bring to them "state-of-the-art"*
- *Keep Consistency within the account*
- *Price match the value for the account and amount of service*
- *Do what you promised*
- *Keep them clear of violations*



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## ACCOUNT JEAPORDY

*RELATIONSHIP MANAGEMENT*

*PREVENT THIS HAPPENING AGAIN!*

*REMEMBER THE 5 WARNING SIGNALS*

- *CHANGE IN DECISION MAKER*
- *CHANGE IN SALES/SERVICE REP*
- *CHANGE IN RESULTS - REAL OR PERCEIVED*
- *CHANGE IN CORPORATE INFLUENCE - "BIDS"*
- *CHANGE IN SERVICE QUALITY – COMPLACENCY PRICE NOW EXCEEDS VALUE!*

*IF ANY 2 OF THESE ARE OCCURRING AT THE SAME TIME*
*YOUR ACCOUNT IS IN EXTREME JEOPARDY!*

*YOU PROBABLY NEED A CUSTOMER BUSINESS REVIEW!*



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## SAVING ACCOUNTS

WHAT IS A CUSTOMER BUSINESS REVIEW?

A formal, prescheduled meeting with the decision makers and if required influencers

Purpose - discussing the value you and your company are providing to them and the company, for the money they pay YOU!

*Use the review to :*

- *fix problems*
- *head off the competitor*
- *Seek more business opportunities- ITS SELLING!*

HOW FREQUENTLY DO YOU CONDUCT FORMAL REVIEWS?



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## BUSINESS REVIEWS

**WHEN DO YOU HOLD A BUSINESS REVIEW?**

- *Any account in your TOP 25!*
- *At least ONCE Per Year/Minimum*
- *LARGER ACCOUNTS may need them more frequently.*
- *When ever there is major change taking place in the account!*

*Remember usually 75% of your income will come from your Top 25% of your accounts. Therefore you can't afford not to!*



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## BUSINESS REVIEWS

**WHAT SHOULD BE INCLUDED IN THE REVIEW?**

REVIEW - What transpired this year?

- Number of visits
- Issues faced and how they were handled
- Upgrades to your treatment or other services

REVIEW – What you plan to do this year?

- How and when this will happen
- Roles and responsibilities to achieve this
- Warnings what will happen if this isn't completed
- Proposals to execute

REVIEW - your agreement.

- Investment Costs
- Compare it to state-of-the-art
- Let them know there are upgrades to your current



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## RECAP 4

- Invest in a CRM
- What Says you are Producing:
  - Tracking Metrics and Scorecards
  - Tracking Sales Activities
  - Tracking Sales
  - Customers Stay and Upgrade
- Goal Setting – What you can see you can achieve
- Business Reviews – Reselling your account

Choose Someone to hold you accountable for Homework



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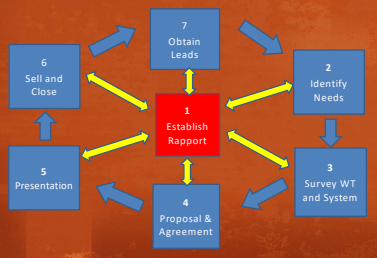
## THE 7- STEP, WATER TREATMENT SELLING CYCLE



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## REALITY CHECK - CONCLUSION

- Who is really your boss?
- Big Sales = Big Money
- Be Professional
  - *Get CWT*
  - *Good personal brand*
  - *Take chances*
  - *Fix mistakes*
  - *Build relationships*
  - *Always follow through*
  - *Be unique*
  - *Be the "Go To"*

If your company is not growing, its shrinking, and you are REPLACEABLE!



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## REALITY CHECK - CONCLUSION

- Sales = what have you done for me lately?
- People buy from people they
  - Like
  - Trust
  - Respect, Relate to
  - Bring Value

REMEMBER:

If you company is not growing, its shrinking, and you are REPLACEABLE!



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## Are You Successful?

- INCOME
- WEALTH
- CREDIT SCORE
- SECURITY
- HEALTH-FITNESS x 2
- TIME FOR SELF
- FRIENDS/FAMILY
- WORK-LIFE BALANCE
- OVERALL HAPPINESS



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## WRAP UP!

- *Questions????????????*
- *Is there any topics I missed or what more can I explain about?*
- *Fill out the survey*

***www. Pollev.com/russellbaski235***



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## "Sales" Book Titles

- Fanatical Prospecting by Jeb Blunt
- Little red book of sales by Jeff Gitomer
- To sell is Human by Daniel Pink
- Think and Grow Rich by Napoleon Hill
- The 7 habits of highly effective people by Stephen Covey
- Secrets of closing the sale by Zig Ziegler
  SPIN Selling by Neil Rackman



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## 20 Week Development Plan

1. Know You – Take the DiSC
2. Look and act like a professional sales person. Understand your perception
3. Understand your companies brand and develop your own
4. Have company attended to social media preference and utilize
5. Master the 10 minute Appointment
6. Develop your elevator speech approve and display at your company



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## 20 Week Development Plan

6. Understand your benefit to your prospects
7. Develop a complete follow-up process
8. Perfect your proposal
9. Perfect your presentation
10. Build Transition Process
11. Take ownership when you lose
12. Know your Competition



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## 20 Week Development Plan

13. Perfect Top Down Selling
14. Develop metrics know you are producing
15. Track your process
16. Develop Personal/Professional Goals
17. Master Time and Territory Management
18. Portray Value Develop Specs.
19. Noticing accounts in jeopardy
20. Perfect business reviews and learn how to save business



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## REALITY CHECK - CONCLUSION

https://www.youtube.com/watch?v=wBEO6iAAMwI&feature=youtu.be