



Anyone for tennis?

BUSINESS DEVELOPMENT

CLIENT RELATIONSHIP MANAGEMENT

LEADERSHIP

Learning to win and develop clients is not like learning to be a lawyer or an engineer – it is much more like learning to play a sport or a musical instrument.

The scene

The Pro's shop at a tennis club somewhere in the suburbs.

Dramatis personae

The Pro

Daniel – fit, skilful and patient.

The Novice

Julian – fortyish, overweight, but with all the 'kit'. He had one forty-minute lesson from Daniel two weeks ago.

Dialogue

Daniel: Hello Mr Evans – how's it coming along?

Julian: Oh! Well. Not good. I'm afraid that lesson didn't do me any good.

Daniel: I'm sorry to hear that – what happened?

Julian: Well last week I played my first match – the first round of the doubles – and we lost.

Daniel: Oh!

Julian: Of course it wasn't all down to your lesson, my partner was useless. I was told he was one of the best players in the club but you wouldn't know it from the way he played. Also the referee...

Daniel: Umpire!

Julian: ... sure, umpire, didn't know what was going on and he made loads of bad decisions. In any case it's impossible to play reasonable tennis on that No. 1 court – the ball flies through at all heights.

Daniel: No. 1 court is the championship court.

Julian: Yes... well... something was wrong with it that day. Anyway, you know you sold me this racket – I don't think the technology is advanced enough for me – I noticed some new ones as I came in, are they expensive?

Daniel: Yes.

Julian: Perhaps I ought to buy one if I'm going to stick at this game. I'm still not sure about that anyway, it was my wife's idea you know. To be honest, and no offence, but the crowd round here are all a bit toffee-nosed. I really don't know what the boys at the snooker club would say if they could see me here!

Daniel: You play snooker?

Julian: Yes, for years, it's a great game.

Daniel: How often do you practice?

Julian: Two or three times a week – if I don't I find I go off the boil.

Daniel: Well...

Julian: ... look, I was thinking of having another lesson – half an hour should do it and let's hope we can do better than last time.

Daniel: Sure, we could work on the basics again and...

Julian: No, no, I think I've got the basics taped – oh, and by the way that grip you taught me was no good. I tried it for a couple of shots and it didn't work so I went back to my old one and it was much more comfortable. No – what I want is some more advanced stuff – you know some 'winning shots' that I can use. I saw someone doing one of those backhand overhead stop volleys last week and it was great – perhaps we could look at that first.

Daniel: Well... if you're sure...

Julian: Sure I'm sure, and on the way we can look at those new rackets.

In this scenario we would suggest that Julian is unlikely to progress beyond mediocrity in tennis – even if he sticks at the game during the coming months and years of frustration – and our experience of working with thousands of accountants, lawyers, engineers, surveyors and all types of consultants has taught us that many of the reasons for the failure of 'sales training' initiatives mirror very closely the conversation played out above.

The obstacles to successful sales training for professionals

'Sales training' can be highly successful for professionals and, most importantly, can give them a significant edge over the competition.

There are three decisive obstacles to the success of such a training programme. If a programme is to achieve its aims it must include strategies to overcome these three obstacles.

I Law / Accountancy / Engineering vs Golf / Tennis / Violin

Learning to win and develop clients is not like learning to be a lawyer or an engineer – it is much more like learning to play a sport or a musical instrument. If professionals approach the training in the wrong way it will fail.

Key questions

- How many hours practice have they had in this area?
 - What on-going continuous coaching have they had?
 - How many days training have they been through in their careers on technical / knowledge issues?
 - How much training, practice and coaching would they need to become champion sports people – the best in their event?

On reflection, how well do you feel that your people are prepared for success?

Considerations

- Professional selling is a skill:
 - understanding what to do is only a start;
 - success comes from application, practice, excellent coaching and feedback;
- 'Experience' is a two-edged sword
 - practice makes permanent not perfect – any 'bad habits' or poor technique can become ingrained after years of experience;
 - experienced professionals often find it harder to 'unlearn' some of their approach (the 'comfortable grip') and to learn anew than less experienced individuals who can learn from scratch.
- The fundamentals are the key:
 - As in so much – sport, music, business – if the basics are right success is often assured. There are no short cuts or magic 'winning shots' in building a client base.

Strategies for success

- Manage the perceptions of the participants – "this is more like perfecting your swing than absorbing knowledge".
- Invest time. We are often told: "my people are intelligent, a lunchtime session should be enough". In fact twenty minutes would probably be enough to explain how to play tennis or to sell – it takes a little longer to become good at it.
- Because time is a big issue for professional staff make sure that any event focuses on application, practice and coaching – the transfer of knowledge should happen outside of any formal programme.
- Practice means role-play! For role-play to be successful it must be designed and managed extremely well; feedback and coaching must be excellent. This is probably the foremost skill required of a professional trainer in this area.
- Outside of any training programme the key to the long term success of any initiative lies in the management, support and, most importantly, coaching within the firm. No training programme will succeed on its own.

2 A culture of no failure

For many professionals 'failure' is seen to be unacceptable and will often be explained away rather than faced honestly. 100% success in practice development is not possible and learning will only take place where reasons for 'failure' are accurately analysed and used as a basis for further development.

Key question

- "Why did we come second?" Talking to our clients the top 10 reasons we are given for them failing to win business are:

1	Lowballing	6	They were never going to move
2	Politics	7	'Buggins's Turn'
3	The clients didn't know what they wanted	8	Goalposts changed
4	Inducement ('bribery')	9	They have had a bad past experience
5	We didn't want the job anyway	10	It just wasn't to be

The common word here is 'they' – it was *their* fault (clients, competitors etc).

The following list represents things we rarely hear:

- We didn't understand the client well enough
- Our proposals missed the mark
- They saw us as no different
- We were too cheap
- We didn't build real credibility
- We didn't manage the process
- We told them what we thought they should have
- We came across as arrogant
- We didn't understand the decision making process
- We didn't understand what made them tick

The common word is 'we' – we were less than perfect and can learn from this.

From our discussions with clients of professional advisers we would suggest that the second list is closer to the truth.

Considerations

- Professional advisers are paid to be right – that is their job. Most professionals are used to success, for example in examinations in their careers. However 100% success in selling is impossible and when 'failure' happens the temptation is to find somebody or something else to blame. At this point learning becomes impossible or, at best, focused on completely the wrong issues.
- The intolerance of failure is often in the mind of the individuals, not the senior partner, many of whom tell us that they would prefer some risk taking by their people. However this makes the fear of 'career-threatening situations' no less powerful – especially, we have found, in senior managers.
- These concerns can undermine any development programme in a number of ways, including:
 - a refusal to try out new skills in front of one's peers;
 - partners (especially 'experienced' partners) are often 'too busy' to be trained;
 - senior managers can be highly defensive to feedback.

If these issues are not confronted the learning that takes place is minimal.

Strategies for success

- Ensure everyone understands the realities of practice development today, i.e. failure does happen.
- Feedback on performance must be effective and supportive so that confidence is built as well as skill.
- An accurate review system with realistic timescales needs to be in place to measure progress in terms of results, actions and abilities.
- Once again success will depend on effective coaching and mentoring. In addition, senior people in the firm must be committed to the project – prepared to be involved, to take risks and to 'encourage' compliance with the key messages.

3 Role embarrassment / disinclination

Few professionals went through years of training because of a burning ambition to 'sell'! Nowadays, however, the ability to bring in work from new and existing clients is being demanded at all levels. Hidden beneath acquiescence, or even false enthusiasm, many professionals are still wary of the whole subject. This embarrassment can be evident in both a lack of activity ("too busy doing other things") and a lack of confidence selling.

Key questions

- If I say the word 'salesman' what words and images jump into your head?

A negative reaction to this question has been at the root of many failed business development initiatives.

Considerations

- Many professionals have had poor experience of 'sales courses'. These were sometimes standard commercial selling courses designed without a deep understanding of the particular issues relevant to professional firms.
- Rejection has happened either at the programme ("I don't want to be a salesperson") or later when the hyped up ideas and 'techniques' feel uncomfortable and just don't work.
- Business development is never urgent until it is too late. If someone wants to avoid this activity it is always possible to point to other activities which are more urgent – client demands, proposals or technical work. Selling will not happen unless professional staff are comfortable in, and motivated towards, the role.

Strategies for success

- Define selling as a professional activity. These are consultancy skills applied in a particular situation – not the skills of a market trader.
- Don't try to change the person or create salespeople. The aim is to have lawyers, engineers, consultants and surveyors who can bring in work. To this end any development programme must focus on developing the skills, confidence and motivation of each person so that they can use their own personality to best effect in this element of their role.
- Critically, all training must relate exactly to client situations – not generics – and needs to incorporate elements of fun and achievement.

Conclusion

The success of 'sales training' programmes for professional firms has been patchy – due in no small part to the reasons explored above. Some firms have continued to invest in the belief that the training is at least doing some good while others have given up, believing that if such training is appropriate then it is only of value to junior staff.

We believe that professionals who can sell well and professionally have a tremendous edge over their competitors. We also know that ability and confidence in this area can be taught. In addition to the above much also depends on how the development process starts. This article concludes with some ideas on how to start a successful initiative in this area.

How to start

- Begin with a pilot – build a 'success story'.
- Convince and involve the most senior people in the firm.
- Set realistic timescales and review both immediate responses and changes in behaviour.
- Invest effort in the quality and relevance of any training programme.



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