

Success in Sales

The Most Natural Process
for Success in Sales

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Course transcript

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Introduction

Every year, articles and reports about the state of the sales profession are published by several business and sales support resources. If you read any of their critical findings, you know that the sales profession, year-after-year, continues to struggle with the *same* challenges. Now add to those challenges the reshaping of how we conduct business since 2020. The conclusion is obvious; the writing is on the wall: the sales profession is long overdue for a major overhaul, in terms of its practices and principles.

The purpose of this course is to empower you toward greater success with a solid starting point for significant improvement in your sales work. If you are interested in *reliable success in sales*, this message is for you.

If you're curious about what qualifies me to address this subject, my background, partial list of my Fortune 500 clients, and dozens of testimonials are available on my website: StevenRobertYoung.com.

As mentioned, this course offers a solid starting point toward reliable sales success. In order to achieve this aim, you'll need to:

- (1) get clear on the basics of essential sales knowledge;
- (2) next, have a process that *guarantees your improvement* (this is *not* your sales process); and,
- (3) gain proficiency with the most important sales skill.

This course will cover each of these—the essential knowledge, my process for guaranteed improvement, and my choice for the most important sales skill. This training is your starting point to greater success in sales.

As you listen to (or read) this presentation, consider yourself—where you stand today—and compare that with each of the points presented in these areas.

Finally, given the importance of this topic to your success, get as much as you can from this presentation with these suggestions:

- **Neutralize any potential distractions.** This compact message is information-packed and fast-paced. If you're distracted, you'll likely miss something important.
- **Take notes.** Jot down your questions. Make no assumptions about my meanings, but, rather, get clarification by contacting me after the course.
- As I address each area, identify what you'll take from this course to apply in your situation. Don't be passive; **be responsive to whatever strikes a chord with you.**

Now, get ready for the basis of **success in sales**. Let's get started.

1

The Essentials

You work in sales. So, what do you know about the sales profession? The first essential of basic sales knowledge is:

- Work from a foundational concept

Your foundational concept is the foundation of your understanding of sales. Why is this important? If you think that sales is "just a numbers game," your misconception will, eventually, work against you. You need a more accurate and relevant concept of sales. The most useful and succinct concept of sales is: *sales is about conversion*. **Conversion—of sales potential into actual sales—is a useful foundational concept for the sales profession**, but it's not as simple as it might seem.

Conversion is not simply the transaction that converts a prospect into a client; [conversion occurs progressively—in stages—and may be best understood with a look at your sales process.](#)

Think about it: your sales process may initially involve *identifying* prospective clients, *qualifying*, and then *connecting* – meeting a prospective client. Your process may involve *nurturing* and/or *negotiations* and, possibly, other steps before finally securing a sale. If you've lost clients, then you may have a process by which to *re-engage* the relationship—convert a former client back into being a client. [All of these are areas are where conversion occurs.](#)

The ultimate conversion generates revenue. But [if your focus is on the final point of conversion, then you are, surely, losing sales.](#) Why? In sales, the first point of conversion is just as important as the final point.

The reason that you must be concerned with your process is simple: [process drives conversion at every step.](#) If you are not successful at the initial and midway conversion points of your process, you will not gain the chance to succeed at the ultimate point of conversion.

Takeaway:

- Sales is about the conversion—converting *sales potential* into *actual sales*.
- Conversion occurs at each point in a sales process where a sale opportunity advances or could be lost.

Exercise

- Consider your sales process. Identify all of the areas where conversion is required in order for you to advance a sales opportunity to a sale.



If you would like more information on the problems with the “numbers game” mentality, check out my article titled, [“If Sales Is Just a Numbers Game, Why Are You Losing?”](#) The article is available through my website (StevenRobertYoung.com), on my blog.

The Purpose of Sales

Before we move on, a word about the purpose of sales. Many hold the misconception that “sales is about selling.” This rather tautological oversimplification is similar to saying: sports—like football, baseball, and basketball—are about *scoring*. Any sports enthusiast will tell you a sport is about strategy, skillfulness and the plan to *outperform* a competitor within specific conditions – conditions that create a course to, and requirements for how to properly prepare for, success.

The purpose of sales is, firstly, to **discover** the course to, and the requirements for, your success. This is the answer to how to sell your specific product or service in a specific marketplace, with specific resources, and against specific competition. After that, sales is all about **profit optimization** through improvements in efficiency. That’s it. Everything we do in sales should center on these primary areas of sales: effectiveness, then efficiency

The next essential basic that we’ll consider is **your uniqueness**.

- Recognize and respect the factors that make your business unique

State-specific Factors:

State = *the characteristics, attributes, and qualities of something that establishes a manner of being*. State refers to everything that makes you unique: your knowledge, competition, service, team—their strengths and weaknesses—, your use of resources, brand identity, etc.

Factors = *one or several elements contributing to a particular result or situation*. Factors refer to the combination of elements that impact (1) the quality or state of something, and (2) an effort to achieve an objective or goal.

Sales is a dynamic profession. It is also hyper-specific. Sales do not occur spontaneously; you sell your product or service to specific customers, in a specific market, through specific salespeople, and against specific competition. Your uniqueness, or state-specific factors, matters. We don't hear much about this point, and an explanation of this problem is a subject for another time, perhaps.

Your uniqueness is critical to your success in sales. Understand what makes you unique, which includes your knowledge, resources, place in the market, staff, product/service, competition, as I mentioned. Also, consider areas of strength *and* weakness.

Takeaway:

- Improve sales with regard for key factors that make you—your business—unique

Exercise

Identify twelve (12) ways in which your business is unique. Be specific. Include examples of weaknesses or deficiencies, such as: lack of sales knowledge; poor skills among team (which you may be trying to improve); disorganization; operational imbalance; insufficient management/support; outdated resources/tools. While improving your strengths is important, you may derive greater benefit by recognizing how you can improve or compensate for areas of weakness.



It may be worthwhile for you to also assess traits that are common among your clients, and note common denominators among those who've not accepted your invitation to connect. Consider aspects of your approaches, decision-makers, means to connect (email, phone, event), other variables, and variance in your process, etc. Think about the different experiences your prospective clients have had with you—with your efforts to sell. See yourself from *their* perspectives.

About Process

I touched upon process in my point about conversion, and, later in this presentation, will address an essential process, but, at the moment, I'd ask you to consider this: **most everything we do in life—throughout life—involves some sequence, steps—a process.** Your building friendships, your education—earning a degree—, your career—climbing “the corporate ladder”—, your romantic relationships—dating and wooing—, your hobbies—the development of your knowledge and skill—, and several aspects of your daily routine all involve a process. And so, too, does selling. Sales don't happen spontaneously; they follow from some process, even if they occur online.

Exercise

With regard to your sales, identify the major steps of your process and, for each step in that process, its respective objective. By way of example: the objective of phone work (scheduling initial meetings with prospective clients) is not to *make calls*; the objective of this step is to *arrange an appointment* with an appropriate decision-maker.

Failure to meet an objective at any of the major steps in your process means *loss of a sale*. Note: most sales are *not* lost in negotiation; they are lost in the process, long before you get to negotiation.

Also, identify the sub-steps of your process, and how you manage data related to your process, such as details about prospects, status of conversion, value, etc.



The third essential of basic sales knowledge involves how you think about sales improvement.

- Since sales work is unique to each business (given state-specific factors), shortcuts and generic solutions for sales improvement should be avoided.

Generally, an effort to shortcut your success is a mistake. Shortcuts gleaned from how-to videos and books are, by virtue of their being designed for mass consumption, generic. And, by definition, generic solutions cannot regard your state-specific condition. So, your uniqueness—resources, capabilities, limitations, competition, customers, goal, etc.—is not factored into these one-size-fits-all sales solutions. Your sales solutions—the support of efforts to sell—must be suited to state-specific factors, what makes your business unique.

Who are you as a unique company—a company that occupies a specific place in the market, vying against specific competition, and with specific resources—your team, your sales system, support tools, management, knowledge, awareness, diligence, and willingness to learn, improve, and change. Your state-specific condition *is important*, and should be the basis from which you choose your solutions. In other words, sales support and solutions should accommodate you—the particulars of your needs and interests.

A major problem with the sales profession is that it, in general (there are, of course, exceptions), as a profession, fails at every point that I've made, so far. Its foundational concept (being a "numbers game") is, simply, problematic. Little regard is accorded to state-specific factors. And, therefore, most sales support services are based on prepackaged solutions that are superimposed onto a

business, or “tailored,” not custom-made for a business. And this situation is likely to persist for two reasons:

- (1) according to statistical data, a large percentage of sales professionals do not want to work in sales; and
- (2) sales work, conducted in a manner that would resolve the ongoing problems in the profession, is not easy, which further estranges sales professionals from their work.

The condition I’ve described makes the idea of a mere “numbers game,” and of there being shortcuts to success, appealing to most of those in sales. And there you have it: a major problem for sales. [Success in sales requires your being the exception to what I’ve described](#). If you aspire to stand among true sales professionals, your determination to succeed now needs a new perspective.

A useful and apt perspective of sales is that the profession is dedicated to:

- (1) [discovery](#) – discovery of how to sell a particular product or service to reach a goal, given specific resources—team and tools—and particulars of a marketplace (customers, competition, etc.);
- (2) [conversion](#) – the foundational concept that sales is about the culmination of conversions across a sales process; and
- (3) [uniqueness](#) – regard for how state-specific factors impact a business must be a central consideration when thinking about sales support and solutions to improve sales.

Once effectiveness in selling is achieved, sales becomes about how increase profitability. At this point, improvements in efficiency can be tackled. Note: efficiency should not compromise effectiveness, as it often does (details on that subject are available in my article, *How Efficiency Hurts Sales*, which is available on my blog).

Takeaway:

- [Adjust your perspective: work in the sales profession is, firstly, about *discovery* of how to sell \(not selling\), with regard for the factors that make a business, and, thus, its efforts to sell, unique.](#)

With your foundational concept now in place, let's talk about the process that will ensure your sales improvement.

2

IDEAL: The Most Natural Process for Success

Simply put, IDEAL is the most natural process to personal and professional success. IDEAL is an acronym for five steps that create a cycle. The cycle is ongoing and builds on knowledge, which, eventually, can lead to the improvements in planning and performance that yields success, such as maximum sales. IDEAL involves:

1. **Being clear on what you intend**—on what you want to accomplish, and what is required in order for you to succeed;
2. **Choosing a course** that will connect you from where you are to where you wish to be, and preparing according to *that* course;
3. **Appropriate actions** that are sufficient in quantity and quality (skillfulness) in order to achieve results required by your plan for success;
4. **Knowledge of where you stand**—your progress toward a (sales) goal. This involves your being able to measure and assess progress, understand what your strengths are, and, more importantly, know what your weaknesses are, so that you may address what must improve;
5. **Change**. Improvement demands change. Change that makes sense must be based on discovery of what you learn from experience (which underscores the importance of the previous point).

Take a moment to consider yourself with regard to these five areas:

1. Your **intention**, what you pursue, strive to achieve
2. Your **decisions**, your choice of a course toward what you want to achieve
3. Your **actions**, and the results attained relative to what you intend

4. Your **evaluations**, how you measure and verify progress toward an aim
5. Your **discoveries**, what you learn, and how you apply what you've learned, as you work toward an endeavor (such as a sales goal or quota).

All pursuits of success require time and effort. But, since it is possible to learn and not appropriately apply the lessons learned, IDEAL is an essential process. Iteration after iteration, IDEAL builds on successes and discoveries, through a willingness to improve.

- Learn drives the cycle of IDEAL.
- Learn allows you to improve what you intend, your plan to achieve, and your efforts to succeed.
- Learn empowers you to make better decisions about your course and being productive.

You must continually assess and learn otherwise you will minimize your potential.

Life (therefore, business) must progress—develop, evolve—because life, our interaction and the contexts in which we interact—personally and professionally—, is dynamic. We reside in a world that is ever-changing. Sales, especially, more than most professions, must evolve because it involves dynamics among people in situations created by pressures of our needs and wants.

Takeaway:

- IDEAL is the natural process for one's personal development, and may be used as a model by which to plan and prepare for, and manage progress toward, a sales goal.

Exercise

Complete this exercise, which may be the most important step in your ability to improve your sales. Respond to each of these five areas:

1. Clarify your goal.

Be exceedingly specific about the details that comprise your goal. Your goal shouldn't be a vague notion, but a crystal-clear vision recorded in meticulous details. Define your goal, pinpoint the completion date, and identify the conditions expected to support your success. Consider strategies to shield your productivity from potential pitfalls.

2. Articulate your process, in detail.

Know just how you will reach your goal. What steps, and their objectives, will enable you to advance from one benchmark to the next? What resources will support that process? Don't assume that you know how to succeed, spell it out step-by-step. This could reveal where aspects of your course are rough, unclear, or missing. Articulate your process in detail, highlighting important milestones.

3. Identify key activities and what results they must yield.

Sales success is a unique achievement that can be formulaic. What are the activities, and results from those activities, that are required in order for you to sufficiently advance toward a sales objective? Question the quality and quantity of your work. Are they sufficient? Results must be either verifiable or measurable. Assess your process, strategies, resources, and skills.

4. Know where you stand.

What data is critical to your ability to track progress, know what is and is not working in your efforts to be productive? Don't guess when you can know that you're on-track. Use data as your compass. Determine the critical metrics that portray a vivid picture of your status toward success. Data should yield insight, offering guidance to optimization. Embrace the power of analytics to steer your ship towards productive shores.

5. Be able to learn/improve.

Be able to learn from your efforts and know what changes are needed in order to ensure your progress, and eventual success. Every success involves a chance of failure; opposition and challenges should be anticipated. Embrace a growth mindset—be open to change and improvement. Adaptation is the key to progress.

It's important to have a clear conception of what sales success involves. In fact, the starting point of any pursuit of success is to *know what "success" requires of you, specifically*. There is a performance standard and process behind every success. However, the key is to understand that success is a unique achievement: performance and process are unique to you. Once you discover what success actually requires of *you*, then sales success will be as easy as following the steps of your process.

Exercise

Determine the most appropriate way to measure your productivity. Know—with certainty—how effective your actions are in advancing you toward your goal. The sin is *not* failure to measure up to a productivity standard; it's failure to know that you haven't measured up.

Finally, question yourself. Think about what you're learning. What are your efforts teaching you? There may be a difference between your conclusions and someone else's. Guard against assumptions that *you* are correct. Have a standard by which to question, test, or compare your conclusions. This exercise will help you make wiser decisions about how to improve.



Be smart, strategic, and look for evidence—verification—that your decisions are sound. Be on guard against pride, fear, and laziness. Ultimately, being a sales success means you've succeeded in several areas or ways. Think about that for a minute. The sublime truth of this seemingly facile comment is that **the successes you may not recognize or regard are what make your ability to sell possible**. Set standards for the areas that drive your ability to sell. Consider these areas:

Prospect, qualify, research, connect, present, follow-up, nurture, persistence, professionalism, data management, reporting, negotiation, etc., etc.



Get support with achieving reliable sales success!

Coaching and courses are available through StevenRobertYoung.com

3

Success in Sales: Strategy

Finally, as promised, here is my top strategy tip for success in sales: **intrigue**

Intrigue, as a strategy, may be obvious to you, but what do you know about *how* to intrigue? Answer the question: *how does intrigue function?* **If you understand the value of intrigue but do not understand *how* and *when* to apply intrigue as a strategic device, your effort to intrigue may fail.** Understand Intrigue more fully. Intrigue captivates interest, which can be leveraged to advance a prospective client in a sales process.

Intrigue, as a strategy, requires preparation and skillful execution. Preparation involves research to identify links, or leverage points, that may be used to compel a prospective buyer to meet with you, or, at least, learn more about you.

In order to better understand and apply intrigue, know this: intrigue functions through three things:

1. **brevity** (of your message);
2. **relevance**;
3. **importance**.

Note: it is your buyers, not you, who determine *relevance* and *importance*. So, get to know them.

The value of intrigue is that it promotes engagement; it inspires a prospective client to want to hear more, to know more, or to experience work with you. So, let's further consider how intrigue functions.

- (1) Brevity (of your message). There are two considerations here: the (a) **content** of your message, and its (b) **delivery**. A message that would intrigue could be ruined by poor delivery. Remember: content and delivery of content (your message) are critically important in order for the intrigue strategy to be effective.
- (2) Relevance. Intrigue applied in a conversation with a decision-maker who, for whatever reason, is not receptive to you is a waste of time. **Intrigue is only intrigue when a prospect sees it as such, which means that it has some kind of significance to them.**

Note: relevance does not necessarily have to do with their work. Consider yourself. What purchases have you made that were for a reason no one could have guessed? Our motivation to buy is *not* always obvious.

- (3) Importance / urgency. **A message that intrigues may need more than to be presented well and have relevance; it may need to strike a prospect as something that they need to take action on now, in the moment.** This is why "limited time" offers can generate greater interest than offers that are always available.

Note: limited time offers that are *implicit* are more effective than limited time offers that are *explicit*. When I traveled, I arranged meetings with prospective clients more easily simply due to the fact that I was traveling.

Intrigue: A Few Considerations

Knowing what it means to intrigue and being able to intrigue—at *every point* along your sales process—are distinctly different; it's the difference between being knowledgeable and being both knowledgeable *and* skillful.

Intrigue is not a one shot deal; intrigue must lead your prospect through your entire process and should focus on their interests and/or needs, not be *directly* about you.

- You must intrigue in order to [get the attention](#) of your prospective client.
- You must intrigue during your sales presentation, in order to [get an opportunity to submit a proposal](#) or quote.
- You must intrigue to [nurture a rapport](#).
- You must intrigue to [up-sell, re-engage](#) a prospective client, and [prevent loss](#) of clients.

Also note that there could be a difference between what *you think will work* as an intrigue factor and *what will actually work* to intrigue a specific prospect. Before you reach out to connect, always have a couple ideas for intrigue, which is why research—learning about your decision-makers—is important.

The 3Cs of Intrigue

Finally, while intrigue should center on something directly related to your prospective client, you can try associations between intrigue factors. That is, consider how your primary prospect-centered intrigue factor might naturally associate with a [secondary intrigue factor](#) that is about you, or your product or service. The combination of intrigue factors must keep your prospect central.

Common associations between intrigue factors that involve you or your product leverage one or more of the 3Cs: capability; credibility; competence.

1. [Capability](#): the potential to provide something of value to a prospective customer. Capability relies on evidence:
 - Case studies
 - Projects
 - Testimonials
 - Sales volume
 - Awards, industry recognition
2. [Credibility](#): the step beyond capability that include your trustworthiness (to *get the job done*) and reliability (to *achieve your customer's desired result*). Credibility makes Capability more meaningful to your potential buyer. Your credibility makes a buyer feel that you would care about, and be of value to, them, specifically. Credibility relies on:
 - Authority—your articles, verifiable information, “voice” and image

- Associations with high profile events, reputable public figures, popular brands
 - Popularity (e.g., followers, clients, online presence, etc.)
 - Ratings, reviews
 - Social media and/or market position (your appearance not only as a leader, but as someone who honors their public position)
3. **Competence:** the answer to a buyer's question about how a beneficial buying from you is likely to be. Competence is, ultimately, determined by a buyer—how a buyer connects your capability and credibility with their interest or need. *Your prospective client's decision to or not to work with you is based on their determination about your competence, which makes your competence relative to your buyers' reason to buy from you.* Your competence may be seen by your buyers when they see you—your product or service—as their means to:
- Achieve – help them improve, acquire, increase, etc.
 - Eliminate – help them resolve, avoid, reduce, etc.
 - Support – help them represent, protect, safeguard, etc.
 - Discover – help them learn, develop, refine, become more resourceful, etc.

Takeaway:

- *Intrigue is the most effective means by which convert a prospective client across the primary steps of a sales process. Intrigue is relative to a prospective client, who must see your competence (includes your capability and credibility) relative to their need or interest.*

Exercise

Design three ways in which you will approach being viewed as competent by your prospective buyers. Remember, your PC buys from you based on their determination of:

1. your ability to meet their need or interest;
2. your trustworthiness and reliability; and
3. the value or potential benefit derived from buying from or working with you.



Keep in mind what you've learned about intrigue: intrigue functions through brevity, relevance, and importance. Relevance and importance are determined by the prospective client, so a generic sales approach won't work.

Be the salesperson from whom your prospective clients would like buy.

And on that note, you have completed this training.

Closing Comments

It is my hope that you found this training worthwhile, and that it will help you achieve the success you want. If you would like further support in any or all of the areas touched on in this presentation, simply contact me through my website: StevenRobertYoung.com. I'm here to help you *discover and achieve*, so that you can reach your goals—whether they're professional or personal. Whatever you do, continue to learn, and strive to achieve, because [your goals matter](#).

All the best for continued—and greater—success



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"Improve sales" is not an actionable goal; it's far too general. Since sales improvement hinges on improvement of the steps defining your sales processes, consider where and in what ways you can enhance your sales process to achieve a targeted result. Here are a few tips:

- 1. Know what you want – *specifically*:** Begin by transforming the vague goal of "improve sales" into a specific targeted result. Identify the exact aspect of your sales process that needs enhancement. Is it lead generation, conversion rates, upselling, or something else? Each of these areas demands tailored attention and strategies.
- 2. Understand your process:** Break down your sales process into its constituent stages or steps. From prospecting and qualifying leads to closing deals and post-sales follow-up, every stage plays a pivotal role. Analyze each stage meticulously. Where are the bottlenecks? What actions yield the best results? This granular view unveils the specific areas for optimization.
- 3. Know where you stand:** Data is your ally in this endeavor. Leverage analytics to reveal what is and is not work in your sales efforts, across each step. Track metrics like conversion rates, average deal size, and length of sales cycle. Pinpoint patterns and trends. This valuable insight will guide your efforts more effectively than assumptions ever could.
- 4. Improve:** With insights in hand, refine each stage of your sales process. Develop strategies that address specific pain points. For instance, if lead conversion is an issue, focus on crafting persuasive follow-up strategies. If closing deals proves challenging, invest in training your team in negotiation tactics. Tailor your efforts for maximum impact.

Empower your sales team with the tools they need to succeed. Offer training that aligns with the refined sales process. Equip them with communication skills, objection-handling techniques, and an in-depth understanding of your product or service. A knowledgeable and skilled team is your greatest asset.

Get support with achieving your goal. Personalized coaching and courses are available at: StevenRobertYoung.com