Relationship Based Sales Strategies for Technical Professionals

Presented by:
Jennifer Gibbs Swets, QKA, QPA, ERPA
Dixon Hughes Goodman, L.L.P.
Jennifer.Gibbs@dhgllp.com
757.457.8442

Chris Stroud, MSPA, MAAA, EA
Simoneaux & Stroud Consulting Services
Chris.Stroud@SOS-Consultants.com
305.479.3023
Learning Objectives

1. Identify weaknesses in current communication style.

2. Develop more effective communication skills.

3. Apply effective communication skills with current and prospective clients.

We are All Marketers Now!

*Touchpoints: The “Customer Journey”*

“Customer experience is the sum total of all contact points, interactions, transactions, and encounters between a customer and a company, its brands, and its various product and service offerings over a determined period of time.”

*(Flip the Funnel, Jaffe)*
Building Relationships
*Trust and Rapport*

*Suggestion:* Make one personal and/or positive comment to each customer per transaction.

Three Dimensions of Communication

- Words
- Tone
- Body Language
The “Fourth” Dimension: Listening

- Communication in all forms is a two way process.
- Listen carefully to what your clients are & aren’t saying to you.
- Listen without interrupting. Repeat phrases to show understanding.
- Practice the P-R-R Method: Pause, Reflect and Respond.

Body Language

- Closed
- Open
- Demanding
- Defensive
- Dominant
Assess the Tone

- Abrasive
- Aggressive
- Appreciative
- Assertive
- Blunt
- Casual
- Cold
- Condescending
- Courteous
- Defensive
- Demanding
- Enlightening
- Factual
- Formal
- Friendly
- Helpful
- Honest
- Informal
- Informative
- Insulting
- Polite
- Redundant
- Sarcastic
- Sincere

Client Communications

*Information requests, etc.*

- **HOW**
  - How would they like you to communicate with them?

- **WHAT**
  - Be clear in defining exactly what you need from the client; anticipate their needs when you can

- **WHY**
  - Tell them why you need it. Give them the “WIIFM” (What’s in it for me?)

- **WHEN**
  - Tell them when you need it and what the next steps are. Set realistic expectations. Keep your promises.

- **+**
  - Add a personalized comment or positive statement.
### Avoid Jargon

*Give them a chance to absorb and respond*

<table>
<thead>
<tr>
<th>Safe Harbor</th>
<th>Plan design that eliminates testing</th>
<th>Fixed contribution allows larger contributions by principal employees</th>
</tr>
</thead>
<tbody>
<tr>
<td>ADP/ACP or 401a4</td>
<td>Required tests by the IRS</td>
<td>Passing allows for larger contributions by principal employees</td>
</tr>
<tr>
<td>HCE/Key EE</td>
<td>Principal employee</td>
<td></td>
</tr>
<tr>
<td>Top Heavy</td>
<td>Successful plan because &gt;60% to principal ees</td>
<td>Requires a fixed contribution but can be designed to eliminate testing</td>
</tr>
<tr>
<td>3(21), 3(38)</td>
<td>Plan sponsor is always a fiduciary</td>
<td>Advisor fiduciary assistance</td>
</tr>
</tbody>
</table>

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### Positive vs. Negative Language

**We regret** to inform you that we **cannot** process your enrollment, since you have **neglected** to provide sufficient information. Please complete **ALL** sections of the online form and submit it to us as soon as possible.

**We are delighted** that you want to participate in the ABC Company 401(k) plan!

We would like to complete your plan enrollment as soon as possible so that you can begin **enjoying** the benefits of the plan. Please complete the online form, filling in the highlighted areas, and we **will be able** to complete your enrollment **immediately**.

**We would be happy** to help you with your enrollment or with any questions you may have. Feel free to contact us at ###.###.####.
Avoid “Trigger” Words

WORDS TO AVOID: (“trigger” words)
• No...
• I’ll try...
• That’s not our policy...
• That’s not my job...
• You can’t...
• I have no idea...
• You have to...
• You need to...
• You must...

WORDS TO SAY: (positive or neutral statements)
• Here are some options...
• I will...
• Here’s what I can do...
• Let’s see what we can do...
• I’m confident that we can...
• I’ll find out...
• The best thing for you to do is...
• What works well is to...
• …< > will be required.

Positive Words

Be sure your messages include positive words like these, used sincerely:

value  benefit  enjoy  pleasure  pleased
inspire  enhance  please  thank  you  agree
appreciate  profit  feel free  saving  honor
help  you  assist  you are welcome  admire
like  glad  delighted  happy  congratulations

We value your business, and we are delighted that you will be working with us at ABC. Feel free to contact us any time.
Avoid Negative Phrases and Connotations

• We regret to inform you that…
• Unfortunately, …
• After numerous attempts to contact you, we have no choice but to …
• Your failure to provide the requested items …
• You must sign and return these forms by …
• We appreciate your response, but we are still missing…
• “To be honest, he is always late to meetings.”
• “He never meets a deadline.”
• “I’m afraid that I can’t help you with that.”
• “No problem.”

Positive vs. Negative Language

Positive language

• Focuses on what can be done;
• Suggests actions and/or alternatives;
• Sounds helpful and encouraging rather than bureaucratic or accusing;
• Stresses positive actions and positive consequences.

Negative language

• Focuses on what can’t be done;
• Can have a subtle tone of blame;
• Can sound like a command;
• Demonstrates an unwillingness to help and/or offers no options.
Difficult Situations

Delivering Bad News
- Carefully craft your first few sentences (no “trigger” words) – then listen!

Listen and Learn
- The brain can’t deal with logic until anger and frustration are put aside.

Diffuse
- Stay calm and let the customer vent
- Give them permission to be upset or frustrated.
- Say “You have every right to be upset.”

Apologize
- Choose apology words carefully when something was outside of your control.
- Say “I’m so sorry this happened to you.”

Accept
- Face reality and accept responsibility. Do not place blame.

Technique: “Buffers”

Express appreciation
- “Thank you for being so patient and taking the time to work through this with me.”

Make a statement that both parties can agree on
- “I agree with you that the new fee disclosures can be confusing. Let’s step through them together.”

Compliment the client
- “I’m so sorry this happened to you – you are one of our best clients and always send your information in timely.”

Express understanding of the situation and the client’s needs
- “I understand that you are leaving town and you need the report by Friday.”
Observe: The World is Your Laboratory

“A lot of people have fancy things to say about Customer Service, but it’s just a day-in, day-out, ongoing, never-ending, unremitting, persevering, compassionate kind of activity.”

- Leon A. Gorman, Chairman of the Board of L.L.Bean