

## **CFS Selling Philosophy: D.E.A.L.**

Clients want to get down to business relatively quickly and with much less formal in person dialog. As a sales rep today, how do you get going quickly on a new opportunity? I have a little follow up email that puts things in motion called DEAL which is an acronym that refers to the sections of the email. “D” stands for “determine requirements,” “E” stands for “engaging the client,” “A” is for “assume responsibility” and “L” stands for “list the criteria for success.”

### **Determine Requirements**

One of the things every good salesperson knows is that it is essential to “listen.” This not only involves actually listening, but also “actively listening” for needs, problems and concerns. The goal is to distill key issues into a series of succinct, well-phrased, numbered bullets that belong in the first section of the email. This demonstrates to the prospect that you understand the reason that he or she needs your help and at the same time, what they are looking to accomplish.

### **Engaging the client**

Here, you let the prospect know what they are specifically responsible for providing to you so that you can help them. Perhaps they need to give you specific information or make themselves and others available for meetings, phone conversations, etc. so that you can give them a budget or a proposal, or price quote, etc. Again, this should be summarized and listed in numbered bullet form.

### **Assume Responsibility**

Now it’s your turn to list what you will do in response to the information that they have provided. Numbered bullets are best, allowing everyone concerned to see your approach and your action plan.

### **List the Criteria for Success**

This section lists the points (of course, numbered) that you believe determine what is necessary for a successful deal to move forward. It might involve providing a scope of work, a product list, timeframes, etc. You’ll probably discover that this is repeated for many of your deals. Therefore, much of this section could be boilerplate.

The document should be succinct and informal. There is a good likelihood that your prospect and if applicable, your internal people, will recommend changes to the document during the lifecycle of the sale. As you get better with practice, you will discover ways to streamline this process to qualify yourself into or conversely disqualify yourself out of a deal at a faster pace.

**Email Example**

Dear Harry,

As promised, this is a follow up to our meeting to determine if we are on track. Please comment and give feedback on my assumptions so that you can make sure we are fit or not!

**I. Acme's CRM Requirements:**

1. Integrate Customer Service, Sales and Marketing to increase communications within the organization..
2. Provide the ability for Sales Reps working remotely to have access to the CRM Data.
3. Manage Sales Rep's territories more effectively; including leads, clients and distributors.
4. Timely follow-up on all new leads gained through trade shows and other sources..
5. Track activity between reps and management in one central database.

**II. Acme's Responsibilities:**

1. Offer feedback to XCRMCo on "Go or No Go" for CRM Evaluation.
2. Allocate time for Acme's Sales and Service Reps, as well as Management to take a closer look at CRM.
3. Identify decision makers and help facilitate meetings between XCRMCo and Acme.
4. Quantify budget for CRM implementation.

**III. XCRMCo's Responsibilities:**

1. Schedule a meeting to demo CRM to Acme key personnel.
2. Create detailed proposal outlining both the software and services for Phase I.

**IV. Criteria for Success:**

1. Acme's Users are Using CRM
2. Acme's Management has more vision on the Sales Pipeline.
3. More effective communication between Sales, Service Marketing, Accounting and Management is observed.
4. Acme becomes a reference for XCRMCo!

Your prospective client calls or emails back with a comment: "You excluded that we need the CRM system to access order history as well." Is this a bad thing? No, It's great! Why? Because your client is engaged in the process! The worst thing for salespeople in this situation is when clients go "radio silent." You don't get any feedback whatsoever! This leaves you guessing.

Imagine for a moment that you commit to send out a D.E.A.L. email on every first face to face call that you go on. Let's say on average that you go on 4 of these appointments per week; 16 per month, right? Which ones are you going to work on first? You got it! The ones that receive a response! We call this a "self select mechanism." The client willingly "selects" into the selling process. This removes that horrible behavior of the rep chasing, pestering or stalking his prospect! Not a good beginning! Now, that's not to say that you ignore the other deals. It only means that you might choose to work on the deals where you have active buy-in.

If you walk into a meeting and early on promise that within 24 hours, you'll summarize this meeting with this type of email, what do you think will happen to the nature of your meeting itself? What seed might be planted in the prospect's mind? We consistently hear from clients that they truly appreciate sales reps who use this approach. The sales rep is focused right away and because of the promise he just made, he is asking key questions and structuring his notes for his D.E.A.L follow up email. Thus, he is at work from the get go!

The D.E.A.L document and associated process can also serve as a good tool to bring your service or other fulfillment group (if it exists) into the picture after the sale. By forwarding the final iteration of D.E.A.L, you've created a fast way to let the delivery side of the house know what's going on. In this example, it can easily unify your three key constituents: Client, Sales and Service.

*For more information about this approach or to speak with one of our consultants about improving your sales email us at [info@criteriaforsuccess.com](mailto:info@criteriaforsuccess.com) or call (212) 302-5522*