



## **CUSTOMER DEVELOPMENT – STRATEGIES FOR CREATING AND KEEPING CUSTOMERS**

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**How can you increase your business's bottom line?** By understanding the three pillars of Customer Development: Marketing, Sales, and Customer-facing Services. These three functions support the Mission, Vision, and Purpose, while being the face of your company's brand value to its customers.

Almost every business owner would say they want—or actually *need*, in order to grow ...

- More clients, revenue, profits, and cash flow.
- More communication among your employees.
- Better problem-solving skills and results.
- Increased productivity.
- More thrilled customers.
- A way to transition your company from its present level of success to a brighter future.

But securing that desired tomorrow—whether it's a year away or a decade or more—requires perseverance to overcome countless challenges that constrain performance.

One of the biggest problems many smaller companies have is there is no one on the present staff that has the time or skills to resolve these issues—and go forward. Maybe it is time your company calls in a consultant to deal with various facets of your customer development.

Before you search out the right consultant, you need to understand more about those three pillars of customer development—the reason we are all in business, and how we can stay in business.

**“The business of business is creating and keeping customers.”**

– Peter Drucker

This simple, elegant, and profound statement can focus and transform a business, and is central to our thinking. It really does boil down to *creating and keeping customers*.

Our focus is the totality of sales performance—but not in a traditional manner. At GAPWORX, we believe that companywide performance is best described as customer development.

The term *business development* is also used to describe this activity, attempting to minimize negative perceptions of sales—real or not. Larger corporations tend to think of business development as a distinct business function, separate from both sales and marketing. In the latter instance, it's usually aligned more closely to marketing, rather than sales.

Here's a good example: At a client's visioning session during their annual executive retreat we discovered something we now share with all clients.

While the sales team was praised for successfully creating numerous high-value clients, the discussion soon focused on the company's failure at keeping those clients. Business growth was stalled due to poor client retention.

I will always remember that meeting because their collective disbelief and frustration were palpable.

Author Scott Pollack provides us with this large-corporation definition:

***Business development is the creation of long-term value  
for an organization from customers, markets, and relationships.***

To a degree, Pollack's definition doesn't address responsibility, falling short of its full meaning. Plus, only larger organizations have the managerial interest and financial resources to consider business development as a distinct business function.

"Customer development" is a far more accurate way to describe "sales" or "business development." Regardless of your preference, selling is—almost without exception—the top priority of business owners.

We see selling as a transactional activity, more one-dimensional and front-end loaded. It doesn't address the imperative for securing a long-term customer relationship, where company value is consistently communicated and delivered as a continuous outcome of the company's Vision, Mission, and Purpose. We believe that "customer development" describes the sales activity more comprehensively.

Outside consultants with the right skills and experiences can pragmatically and cost-effectively elevate business performance in small- and mid-sized businesses (SMB), if they treat customer development as broadly describing your companywide sales performance, including marketing and all other customer-facing services.

While our message is applicable to businesses of all sizes in all industries, our goal is to help you understand: 1) how customer development functions, 2) how its three disciplines are aligned, and 3) how companies can augment the capabilities of existing operations by hiring the right consultant.

The latter is relevant if your management team is already stretched too thin, or if the experiences and/or subject matter expertise are currently missing in your business. Setting a new direction can be accomplished with existing staff, but many business owners have found that hiring outside expertise makes financial sense, brings new perspectives to the organization, and, in many instances, is the best course of action given the volume of ongoing staff responsibilities.

### **Pragmatism**

Of course, the creation of long-term customers and value in organizations of all sizes is focused on customer needs, markets, and relationships. How that is accomplished in SMB, however, is different.

Owners must be exceedingly pragmatic to be successful, streamlining business activities and processes to optimize performance in all business functions. Resources are limited. Efficiency is required. Multi-tasking is commonplace. In recent years, a SMB consensus opinion was to *“hunker down, streamline costs wherever possible, and just wait it out.”*

It’s time to step out of that mental bunker and re-evaluate your processes, practices, policies, and your people. It is time to take a new look at customer development to align and leverage business success.

The place to start is with the three pillars of Customer Development: Marketing, Sales, and Customer-facing Services. These three functions support the Mission, Vision, Values, and Purpose, while being the face of the company’s brand value to its customers.

## **Pillar Number One: MARKETING**

### **The Functional-dominance Myth**

Many business owners express uncertainty or ambivalence related to marketing’s functional value. Most acknowledge that marketing and sales are aligned, connected functions. Some hold that marketing is the dominant function; others believe it is sales.

We look at it differently.

The dominance of one discipline over the other is irrelevant. The company’s Mission, Vision, and Purpose are the driving forces. All functions of a successful business are subservient to the strategic goals and objectives of the company, as well as the needs of its customers. Both sales and marketing are the voice of the customer, and must be in sync. Working hand-in-hand with leadership and sales professionals, and collaborating with other departments, the marketing function weaves a tapestry connecting all employees together to more effectively create and keep its customers.

### **Scale and Resources**

With rare exceptions, business owners want to grow. But, what if you don’t have a huge team of marketing professionals to hone your brand, or have large budgets to constantly export that brand to your market?

There are generally only a handful of business challenges that hold growth back, and maybe one or two market opportunities that could accelerate business growth. But, you aren’t sure how to make it happen. Maybe your executive team does not have the needed experience and expertise to eliminate the challenges, or take advantage of the opportunities. The roadblocks must be addressed. The opportunities must be tackled. You still need to build your brand, to *create customers*. You still need to *keep customers*, to constantly reinforce their engagement, trust, and loyalty, related to their decision to purchase from you.

You may conclude you need help, and the expertise of an outside consultant is a viable option. But how do you select the right consultant to help you and your team to achieve your objectives?

- Do you hire someone on a part-time or full-time basis?

- Do you hire an outside consultant to kick-start a new strategy, or implement a specific initiative?
- Then later, after outside expertise is gone, how do you maintain newly forged business growth?

All are good questions.

### **“Plan Your Work, Work Your Plan”**

Marketing is composed of many different areas of specialization. Depending upon the industry, business model, products, and services, some sub-disciplines may be more or less relevant to a company’s need. Marketing in enterprise-level organizations routinely involves the full range of marketing specializations; marketing as applied in small- and mid-sized businesses will likely be more basic and pragmatic.

Conceptually, look at marketing as divided into two basic types of activity, as expressed in this popular quotation: “Plan your work; work your plan.” It is a good way to look at marketing’s various components or sub-divisions.

To illuminate marketing’s value, I’ll describe a small business, the owner’s process to engage with a marketing consultant, and the impact of that consultant on the business.

A small contractor provided specialized remodeling services to small medical and dental clinics. The two owners literally started on a “wing and a prayer” and a first project from a friend, and grew steadily over a handful of years from numerous referrals. Their initial success was derived from their perseverance, hard work, and dedication to deliver high quality in each client’s project.

However, the owners observed that annual growth was tapering off, and recognized that competition was “kicking our butt” more frequently. They decided to look at their business more in-depth, and to hire a marketing consultant to improve their bare-bones website, improve the impact of their proposals and collateral materials, and expand their target market beyond clinics.

With no experience in hiring consultants, they asked friends and colleagues for referrals and suggestions on how to make the selection. These owners did everything right, making this truly a business case study to emulate.

After interviewing several marketing consultants, the decision was easier than they first imagined, as both owners chose the experiences and expertise they needed, and someone they trusted.

The consultant emphasized the importance of Planning—the first steps being Discovery, defining their long-term Vision, Market Research, Analysis, and Strategic Planning. He pointed out that marketing was similar to remodeling in that a successful remodeling project

requires forethought and planning prior to engaging in the actual work of remodeling. It made sense to the owners, so they invested in planning their work, their business.

As the strategic vision and plan unfolded, including the analysis around expanding the target market and aligned positioning, the consultant shared a list of next steps and tactical recommendations to prioritize and phase in one-by-one. He recommended that the owners, per their updated market vision, revitalize their brand identity, and hire a graphic design firm to create the updated brand with both their existing customers and the newly targeted market. Per the original concerns, the design firm built a new website, and created collateral materials to help the owners promote their business, and bring a more sophisticated value to their proposals and presentation materials.

As the first tactical recommendations were accomplished, the owners phased in targeted advertising, and they began promoting their business activities through selected social media platforms, industry/market-specific trade shows, and related forums. They were encouraged to annually revisit the planning processes, and to pay attention to the metrics of their business.

The consultant's advice was to take it one step at a time—to plan the work, and then work the plan.

A couple of years later, their growth rate led many of their competitors. They won a higher percentage of the projects they sought. They continue to plan their work and work their plan, which was a formula for long-term success.

Another marketing tool to consider is “the 4Ps.” Although somewhat simplistic, the classic 4Ps are **Product, Place, Price, and Promotion**. (We won't elaborate on their worth; there are countless resources to pursue that further.) Every business should address those elements in their marketing strategy. But, add **People** to that classic set. That fifth P is representative of the power of a company's positive culture, which is a powerful leverage point to your brand. We address “People” more later in this chapter.

## **Pillar Number Two: SALES**

### **Elevating Sales Performance**

Business owners almost always cite “increasing sales” as their highest priority. However, many companies haven't carefully defined their sales methodologies, nor trained their sales team to execute it. To whatever degree sales methodologies, systems, and training are missing, these companies are just winging it, and leaving total company performance short of the mark.

Business owners hire sales executives hoping, even praying they are a “rainmaker”—seeking one of the 20 percent who sell 80 percent of the products and services. Few questions are posed in the hiring process to understand an individual's sales methodologies, behaviors, and systems that

support rainmaker outcomes. And without this understanding, many companies are only setting expectations of desired outcomes.

Sales jobs in the classic play, “Death of a Salesman,” were characterized by personality, guts, and perseverance. The sales process was shrouded in mystery and a drop of snake oil. A buyer’s attention was captured using charm and power-selling phrases. “Closing” was measured by signatures on the dotted line.

Fortunately, we learned that selling could be elevated from hard sell and arm-twisting contests to real conversations, creating new business and long-term customer relationships. Then, with the massive shift of access to information via the Internet, a buyer’s reliance on learning about a company’s value proposition from the sales representative was forever changed. Buyers had more choices. Consequently, sales methodologies and training evolved to be even more competitive, to reflecting the changing market environment, human psychology, motivation, behavior, and decision-making. The modern age of professional sales had arrived.

Successful companies simply don’t take an off-the-cuff, make-it-up-as-you-go attitude toward sales. A trained sales force that consistently uses sales methodologies are requisite foundations for creating customers and building future revenue. A Customer Development methodology is the roadmap *all* employees with roles and responsibilities for *creating and keeping* customers should follow.

So, wanting to “increase sales,” how does a business owner instill a more professional sales methodology or system?

### **Training and Engagement**

Virtually all companies—to be effective in achieving their business goals and objective—should have a defined system for comprehensive sales engagement.

A fully trained sales representative is a sales professional, capable of effectively communicating a value proposition, and securing the sale of company products and services. Looking at sales expertise on a familiar scale used in other industries may be helpful: apprentice, journeyman, and master sales professionals. Certainly, sales expertise varies per individual. The point is to elevate the individual and team selling skills, capabilities, and behaviors to achieve better outcomes.

Consider the classic corporate conversation about training often attributed to Zig Ziglar.

***“What if we train them and they leave? Think of the wasted money.”  
The poignant response, “What if we don’t and they stay?”***

Again “customer development” is a far more accurate way to describe “sales” or “business development.” Regardless of your preference, selling is, almost without exception, the top priority of business owners.

Comprehensive sales engagement refers to the set of customer development interactions supporting the sales process with new and existing customers. The major interactions are: Sales Executive to Customer, Sales to Marketing, Sales to Customer-Facing Services, Sales to Executive Suite,

Marketing to Customer, and Customer to Customer-facing Services. Other interactions may exist in some companies.

These interactions—customer touch points—must be mapped, designed, trained, and managed to *create and keep customers*.

### **Training Products**

Enhancing sales training for your professional sales team can be highly formalized by using a standardized sales training product, or one customized and adapted by the company from multiple sources, learning models, and experience sets.

Off-the-shelf sales products are offered by national sales training organizations. These products have methodologies outlined in books or online instructional manuals. Other companies have created proprietary sales training products sold in a more limited geographic market. Enterprise-level organizations have also created custom-tailored systems, some of which are marketed more broadly.

Instruction is provided by sales consultants, franchises, or licensed trainers at a per-student seat price. These products are designed to hone sales skills, follow a strict learning design, follow set procedural methods, and they require multiple days up to a week or more to cover the curriculum. Any number of these products can be very useful.

A potential drawback to using a proprietary sales method is its rigid focus on procedure and technique. Sales trainers, who have one sales system, have a vested interest in wanting their students/clients to strictly follow the underlying philosophy and steps. Beware that your prospects also take these sales courses, read sales training books, and might react negatively to overt sales techniques being used or directed at them.

Seasoned executives can readily identify specific sales techniques. Some techniques are more subtle and natural; some are more overt and formulaic. Regardless of the sales techniques employed, always be genuine, sincere, and honest. Never berate the competition, or even stretch the truth.

I recall a logistics question posed in a final contract negotiation. This specific question was not anticipated, but it was central to a prospect's decision to purchase over \$4 million worth of industrial services. Hearing the question, I said, "I don't know, but I can quickly get the answer." The buyer later shared that the contract was awarded to my company based on the honesty and the substance of that answer.

No single sales product can provide the totality of effective sales knowledge and practice. People who consider selling to be a profession should continuously learn and improve. But, avoid potentially narrow thinking. Your company should continuously expand thinking, behaviors, and application to improve "hit rates." Conversely, don't repeatedly change methodologies because that is equally dysfunctional.

Companies can benefit by establishing a common set of desired sales behaviors and skills, and to experience solid results before taking it to the next level. For the selected sales training product to

be effective, the entire sales team should consistently be adapting to the process. The reluctance or failure of one or more sales professionals to accept the sales methodology can weaken the team's overall effectiveness. Research shows that as much as 30 percent of your sales team is not suited for sales. Maybe they can assume other roles in the company, but build a cohesive sales team. This increases your costs in training and development, and will affect your overall sales.

As long as the chosen methodologies accommodate individual personalities, styles, and values, it can be a workable system. Systems that promote contrived elevator speeches, stock answers, and cookie-cutter solutions, should be avoided. All sales teams should be encouraged to always be a learning team.

Today, more than ever before, an effective sales effort is both systematic and professional.

### **Behavioral Awareness**

One can enhance sales skills by being attuned to human behaviors. It's a more diverse, even holistic, approach to building sales skills. It leverages the strengths of a professional sales executive by expanding the sales universe.

People buy from people and companies they trust and like. While there is a rational aspect to choices being made, buying decisions are predominately emotional in nature.

With a career focused on marketing and selling high-end products and professional services, I can attest that I *never* closed a sale without having first established a strong measure of trust with the buyer. If I wasn't liked and trusted, there wasn't a basis for closing the sale.

A behavioral approach focuses on the emotional nature of decision-making, drawing from sales theory, behavioral schools of thought, and applied methods—the how. It focuses on people, on human behaviors, and on how to best interact with customers to heighten their positive customer experiences and their loyalty to your brand.

Finding a consultant skilled in behavioral methodologies is critical to this approach, drawing from the best-of-the-best of sales thinking and application, and in being proficient in using this knowledge to engage the sales team differently so they can also engage their customers differently.

All sales training products have strong commonalities, and revolve around established values and applications. There is a consistent emphasis and focus on creating professional rapport, asking good questions, discovering needs, offering precise solutions, and carefully matching products and services to the prospect. They are very much like “variations on a theme.”

Some sales training products and consultants have incorporated behavioral knowledge into their systems to help businesses raise the bar.

### **Optimizing Sales Performance**

Let's address positive and negative company and sales cultures.

In Company A, the sales team is making quotas, profits are high, customers are happy, and bonus checks are making the sales team happy. Life is good. Some employees are stressed with the



workload, but most employees are smiling. A positive attitude is pervasive throughout the company. Operational employees are busy delivering products and services. The sense of optimism is palpable. It's a winning team.

In Company B, sales quotas are falling short, profits are flat or down, customers are less than happy, and bonus checks aren't being cut. The boss and most employees aren't smiling. There is a harder edge to many conversations. A more negative attitude exists in most departments. The team isn't winning.

The two hypothetical company profiles are strikingly different, and many companies would have a blended profile, but the point is that a successful sales team can and does have a powerful impact on the entire company culture.

For "poor" sales performance, there are many reasons for inadequate revenues, profits, or client-growth metrics—but let's focus on the positive side.

At GAPWORX, we are avid proponents of elevating individual employee performance, and of setting and achieving individual and company goals and objectives. We advocate that companies should have both individual and team sales goals, as well as quantifying sales calls, appointments made, and other leading performance indicators. There should be designed roles, responsibilities, and behaviors for every "touch point" in the customer experience lifecycle.

This comprehensive cultural approach to customer development is the foundation to building more clients and more revenues. Therefore the consultant you choose should have a broad set of capabilities to get you there.

A consultant's set of capabilities should include:

- **BUSINESS PERFORMANCE**

Current understanding of business performance zeroes in on employee engagement. A business culture—a sales culture—must have a clear vision, employee alignment and buy-in to that vision, and have engaged people fulfilling specific roles and responsibilities to reach, achieve, obtain, and even enhance that vision. Business research and data clearly support the perspective that without an engaged workforce, you *will not* have engaged customers. They are locked into each other, and that mutual and interactive relationship determines the financial results for companies.

With guidance from your consultant, marketing and sales strategies will play out in your culture, in your workforce, and with your customers. You become aware of your metrics and your aesthetics, or more simply put—what you do, and how you go about doing it.

If an objective is to have more customers, revenues, and profits, then everyone needs to do some things differently to get more of what your company wants.

The consultant should have the capabilities to help you assess your companywide strengths and weaknesses in order to determine how they play out in getting and serving customers. There should be an entire "mapping process" that clearly identifies your "go-to-market" strategies and tactics, your

selling processes, and your customer-service processes. These elements are all linked together, and they must continuously adapt to a changing marketplace.

This customer development map is somewhat like an organizational chart, but much more targeted. *Creating and keeping customers* is a continuous stream of activity; account for and manage the individual and team roles and responsibilities associated with it, as well as customer interactions. Remember, customer development is a companywide set of policies and practices, and roles and responsibilities, aligned to the company's mission, vision, and purpose.

Some employees will have roles and responsibilities specifically designated as “professional sales”; other employees will have roles and responsibilities assigned to other business disciplines, but interact with prospects and customers. Remember those customer touch points? Every employee has responsibility in *creating and keeping customers*—in customer development, and specifically, in the sales process.

Sales and marketing employees are highly focused on *finding or creating customers*—and other employees actively support them and those activities—but all employees play a vital role in *keeping and thrilling customers*. It might be mailing statements or invoices, answering phones or emails, selling ideas, innovation or customer-oriented solutions to other employees, or be evidenced in countless other ways. It is especially important to: 1) communicate clearly and effectively throughout the company about opportunities and challenges, 2) proactively “upsell” additional products, services, and value offerings when appropriate, and 3) aggressively prioritize solving any client problems.

***A growing realization in business is: Everybody in every company must sell.***

• **SPECIALIZED SALES EXPERTISE**

Some sales representatives have specific roles; common terms are “hunters” or “farmers.” Hunters are charged to *find and create new customers*, to land new customers. Farmers are charged with a more supportive sales role, with nurturing, account management, and problem-solving abilities, because they are more adept at *keeping and growing customers*.

A skilled consultant will teach and train the entire customer development team on a range of sales and sales-support skills. Depending on the mix of professional and non-professional sales staff, the skills must be there to support customers. A modern sales team must have effective interpersonal communication skills, and collaborate with everybody else in the company who might affect the relationships of customers.

Selling practices should incorporate a modern understanding of human behavior, and embody the “soft skills” of interpersonal communication where sales success can really happen. Gone are the days of one-sided sales pitches and gimmicky closing techniques.

Today's sales people are selling to prospects that live in a savvy, hyper-aware, enlightened age. Buyer expectations are elevated. The sales representative is no longer the conduit to critical product information. The Internet has changed that forever.

Buyers expect a sales executive to communicate well, and take a more educational approach. A sales consultant should possess a wide range of professional selling skills, but also realize that selling is helping customers to fully understand the value proposition. It is about educating the buyer.

Your sales team needs to discover market opportunities, and identify the specific needs of the prospect. Critical sales communication skills include eliminating jargon, using open-ended questions to probe for client needs, listening intently, and then understanding the answers. Effective presentation skills are also needed to *create and keep customers*. It's not just about delivering slick PowerPoint presentations. Salespeople need the ability to create alignment to get an agreement with your prospects, and match their needs with your solutions.

A professional salesperson will display verbal and non-verbal balance in the sales encounters, using both patience and understanding. It's necessary to show empathy to a prospect or a client, particularly if they express an objection. These are emotional intelligence skills, vital to business success.

To produce good customer experiences, support staff should also have an effective range of those same abilities for customer-facing services. Every employee needs to be able to work through barriers and objections, complaints, and unanticipated customer requests.

- **LEAD-GENERATION TOOLS**

Prospecting is a dated sales term. Today it's called lead generation. Who is finding your new sales prospects? How will you use technology to manage lead generation? Although the "sales prospect funnel" isn't listed on corporate financial sheets, a company should view sales prospects as company assets. Sales prospect information used to be kept only in the heads of the salespeople, or on sticky notes, entries in notebooks, etc. That information is much too valuable to be recorded in such haphazard fashions, and is too easily lost. When a salesperson leaves a company, such information literally goes out the door.

A customer development consultant should be able to help you with sales automation tools such as Customer Relationship Management software (CRM), to help you manage contacts, sales and customer communication, workflow, and sales forecasting. Successful sales organizations need information to manage its potential; that information can be managed within the CRM. If the data isn't entered into the CRM, commissions aren't paid. That's a commitment-to-sales process.

- **PREP AND PRESENTATION TOOLS**

Technology is prevalent in today's selling environment, providing alternatives to paper-based marketing and sales collateral. Printed materials have always been costly, cumbersome, and out-of-date way too soon. With laptops and tablets, it is much easier to illustrate and support selling activities. We have become a world of color, action, and interactivity. Technology has made it possible to "show your stuff" in many interesting and efficient ways.

We are a mobile society with mobile communication and just-in-time information. The more diverse and widespread a company's sales effort is, the more valuable mobile technology will be. Sales,

marketing, and technology consultants can work hand-in-hand to develop sales support tools. Use technology to research the prospects in your marketplace, and then make a compelling presentation.

### **The Continuum of Customer Development**

Literally every aspect of your interaction with your prospective and active customers must be choreographed to be consistent, genuine, and convey your value proposition.

Let's consider a hypothetical example, one that's an amalgamation of several real-life stories, and one that customer development consultants can support.

#### **“ABC MANUFACTURING COMPANY”**

John and Jane Smith, in their early fifties, are focused on revitalizing their underperforming business. Coupled with a vague exit strategy, their dreams of retirement (traveling the world) by age 60 seemed improbable. They want to step it up.

Currently, ABC's marketing is led by a VP, and executed by two department employees, and sales efforts are led by another VP managing four Regional Sales Managers. Their design, product development, and operational activities are led by a VP with six direct reports. Although seeing fundamental strengths in their executive team, they sense that new perspectives are required. So, they interviewed several consultants to make recommendations and support change management, but remain unsure how to make the hiring decision.

At minimum we would recommend expanded discovery and hiring two consultants. One consultant should possess customer-development expertise, and the other should have exit-strategy expertise. Whether your specific circumstances are similar or quite different, there are common approaches to consider, which include:

#### **• NARROWLY DEFINED EXPERTISE**

First, business owners should always consider the input of outside consultants who minimally should have moderate-to-exceptional experiences and expertise in a given functional discipline. However, marketing and sales are broad disciplines with many areas of specialization. All areas of specialization may or may not have relevance to your business. Know the consultant team, and if needed, how they augment their deliverables with the expertise of others, as well as your team.

Functional expertise is a given. But, seek more. Ask lots of questions. Here are some things to look for:

- *Leadership skills* and core attributes, such as integrity, respect for others, creativity, commitment, and a host of similar qualities.
- *Solid problem-solving skills*. That always involves the ability to ask thought-provoking questions, matched by the ability to listen well. The consultant needs to find the gaps, the issues holding you back.
- *Good communication skills*, both verbal and written.
- *A sense of urgency*, as well as time management skills.
- *The ability to analyze* and dig deep when needed, when answers don't quite add up. This is equally important in order to build a solid plan.

The accumulation of relevant facts should be balanced with the ability to bring clarity to complex sets of data. And, understand that marketing, sales, and other departments don't function in isolation inside your business, so the consultant needs to have a solid understanding of general business, plus your markets and the channels where your business operates. While there are exceptions, the consultant doesn't need to be steeped in your industry experience. You bring that to the table as you collaborate and solve problems. Make sure the consultant is committed to keeping you fully informed.

Finally, and possibly most important, a high-performing consultant should have strong people skills, support building a positive culture inside the company and exporting that culture (your brand personified) to your prospects and clients. Your company's culture in the workplace is literally reflected in its brand image and messages. Pay close attention to cultural attributes. Your consultant should, too.

*Special note:* With virtually no exceptions, the "seek more" bulleted recommendations above are applicable for hiring any consultant you need to support the customer development process.

- **ROADMAPS AND METHODOLOGIES**

Organize your next growth initiative by using a process roadmap to promote company achievement. It's easy to use. It can save you thousands of dollars and countless months or even years of worry and frustration, setting your company on the road to success.

- **Awareness (or Discovery) is a critical first step.** Determine a solid understanding of where you are today (Present State), and then secure a clear understanding (Vision) of where you are going tomorrow (Desired Future State). It is nearly impossible to craft or execute a plan without first knowing where you want to go. The challenges (gaps – the impetus for our company name – GAPWORX) preventing company success are more visible if you understand where you are, and where you want to go.

This is typically accomplished through employee surveys and in-depth interviewing of the executive team, coupled with market and competitor analysis. Build on what you already have.

- **Action (or Planning) is the next step.** By understanding where you are today, and where you want to be tomorrow, only then can your marketing consultant and your management team begin to craft a viable plan. In many instances, the plan is best accomplished with a consultant's outside perspectives that offer new insights gained from taking a comprehensive look at your business. Other disciplines contribute, but marketing typically leads the effort. Every business repeatedly navigates business challenges to create or update an effective strategic plan to accomplish their goals and objectives. Planning is a continuous process.
- **Attainment (or Implementation) is the final step.** But this step is very closely linked to the Action step, and is open-ended. This is where most businesses tend to fail. I will repeat: *This is where most businesses tend to fail.* Maybe old habits just creep back into patterns of

behavior, or maybe leadership shifted its focus. Maybe the consultant's recommendations were too complex, or not scaled to the resources of the company.

This is the time when champions, change management, and all executives should remain focused. It certainly requires leadership and perseverance, as well as having specific, incremental, and measurable goals. Are you achieving goals, or just holding ground? Pay close attention to your Key Performance Indicators (KPIs) and the predictive metrics supporting the KPIs. Constantly adapt and refine your plans.

Training your people and building your culture can make your brand shine stronger.

## **Pillar Number Three: CUSTOMER-FACING SERVICES**

### **Everybody Must Sell**

Expand the concept of selling; move it outside the exclusive domain of the professional sales force. It necessitates a comprehensive understanding of the business' selling proposition, which requires a custom-tailored approach.

In this approach, the customer development consultant illuminates and maps a companywide set of "processes, practices, policies, and people sales-oriented roles and responsibilities."

If a "Process, Practice, Policy, or People" interact with a prospect or customer in any manner, it must be accounted for, mapped and designed to support the Mission, Vision, and Purpose of the company. The last P—People (your employees)—is the most important.

*If it is about creating new customers, building revenue, making more profits, and keeping customers happy, then everybody has to do it.*

Every employee has some measure of a "sales" responsibility. Everybody supports the sales process in some manner. You can have the best processes, practices, and policies, but people can either implement them successfully, or not. These Ps should be consistently executed.

With everybody selling, it is not just about following a technique-based sales methodology. It is far more comprehensive, and custom-tailored to how each company *creates and keeps its customers*. The company's culture—executed by senior management to the most junior employees—is committed to getting and hanging onto customers. As it's implemented, the company becomes a goal-driven culture that carefully defines, prioritizes, and implements all of its customer development disciplines: Marketing, Sales, and all Customer-facing Services.

A skilled consultant can help instill specific cultural attributes, values, and behaviors for a company to build its business, but this is a comprehensive change-management process that requires company leadership and the commitment of all executives. It can't be a selective opt-in or opt-out decision by various managers.

The across-the-board "buy-in" and dedication to *create and keep customers* should be woven into the fabric of the company. Customer development mindsets—in Marketing, Sales, and Customer-

facing Services—should be infused into all levels of the company. Success is achieved by understanding market vision, and matching goods and services to prospective customers who also value the same things.

This companywide approach to customer development, to selling and serving, isn't traditional. For whatever reasons, customer development is viewed as a function of the sales staff, and everything "sales related" is relegated for them to accomplish. Enlightened leaders understand where their business comes from, and who gets the business for them. It's every employee.

To *create new clients* and grow revenues, there is an emphasis on professional sales and professional marketing. To *keep customers* and sustain growth, there is an emphasis on optimizing customer-facing services. We are not undervaluing other business disciplines, such as operations, human resources, administrative services, etc. In fact, they are part of the customer-facing services we include in "everybody must sell."

Ultimately, it's about:

- Your customers, about *creating and keeping* their loyalty,
- Delivering value, and
- Designing and consistently delivering an enhanced customer experience with every aspect of your company.

Customer experiences can be positive, subconsciously affirm or even thrill the customer, or they can be negative and have an adverse impact on future sales. A single, insignificant negative customer experience might be shrugged off, but negative experiences are cumulative. Beware!

The challenge for companies is that about 90 percent of the time customers will simply find other providers if the negative experiences pile up too high. You might never know why they left to spend their money elsewhere.

### **Implementing "Everybody Must Sell"**

It begins with clarifying and understanding the purpose of the business, and linking that to how it will benefit the customer. Once this linkage has been accomplished, it needs to be "plugged in" to a fully defined and working sales system. And this process should involve everybody who has a role or a responsibility for *creating and keeping customers*.

### ***But, I'm not in sales! That's not my job!***

It's an all-too-familiar comment. However, if any employee interacts with a customer—either directly or through their work product—that customer-facing interaction has a direct bearing on how the customer "experiences" the products and services your company provides. Therefore, these employees have a responsibility to support the sales function.

Making this type of change isn't accomplished with a single companywide meeting, or by redistributing updated job descriptions that highlight a sales-support responsibility. This is a cultural change initiative that requires planning, many open conversations, behavioral training, and outside facilitation.

Abruptly announcing that everyone now has “sales responsibilities” will not be universally well received. Some employees might not understand that supporting the sales process *is not* the same as being in sales.

A lot of people would say, “I could *never* be a salesperson.” The reasons behind that statement are different for everyone, but many simply don’t see themselves selling.

The challenge for the consultant, and those leading change in the company, is about:

- Educating and training with the idea that supporting the sales process is inherent in every job function.
- Communicating and solving company and customer problems, and giving each employee the tools to make that happen.
- Helping customers to solve problems.
- Delivering value and service to your customers.
- *Creating and keeping your customers.*

**“If you think training is expensive, try ignorance.”**

– Peter Drucker

### **In Conclusion**

Leadership’s commitment to an organization-wide system of customer-development processes and workflow is vital to long-term company success. These customer development methodologies and systems are the frameworks, and all your sales strategies and activities need to be linked to the frameworks. Integrity, consistency, and accountability are vital to create new clients, and make more money.

Without methodology, behavioral training and technology tools, and a commitment to use them skillfully, it is difficult to manage marketing and sales efforts. It will be even more difficult to manage the development of exceptional customer relationships.

We advocate customizing customer-development systems that everyone builds together and commits to using. For employees not in a professional sales role, it might entail teaching them a set of skills that are absent or inadequate. For others, it could be a “graduate-level” sales course tying in the best processes and content available from both experience and the research literature.

For everyone in the company it is an ongoing learning experience to make sales communication and customer support much more effective. The payoffs can be enormous.

Let’s close by repeating Drucker’s mantra:

**“The business of business is to create and keep customers.”**

### **GAPWORX**

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