

**BUSINESS SERVICES IS A
CONSULTATIVE SALES PROCESS,
NOT A SOCIAL SERVICE**

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LEARNING OBJECTIVES

- ③ Clear Understanding of what is Consultative Sales and how it is applicable in Workforce Development
- ③ Where Consultative Sales is and isn't appropriate as an approach
- ③ Recognizing the value of thoroughly identifying your business customers needs, building service strategies around those needs

BUT, IS IT REALLY SALES?

- ③ Costs = Time, energy and opportunity cost
- ③ Competition – From staffing agencies, web based recruiting services, news paper, to walk-ins. Especially in this labor market we have to work hard to capture and retain business customers. Your relevance is hinged on your ability to identify and meet their needs.
- ③ Stigma – Whether it is true or not workforce systems are still seen as slow, government, limited, social service and not business service driven.



SO WHAT IS CONSULTATIVE SALES

- ① Sales process that is structured around the identification and fulfillment of a prospects most critical needs.
- ① Integral to this process is the sales rep ability to establishes themselves as an expert, develop a strong rapport, and focuses on the needs of the business.

DIRECT SALES VS CONSULTATIVE SALES

- ① Direct Sales (aka Transactional, Traditional)
- ① Direct Sales is a sales process that focuses on conveying product/service(s) USPs (Unique Selling Propositions), meeting objections and securing commitment by closing the sale with as many qualified prospects as is manageable.
- ① Product focused

DIRECT SALES VS CONSULTATIVE SALES

Hallmarks of Consultative Sales

- ⊙ Long term customer relationship
- ⊙ High rates of commitment (closing percentages)
- ⊙ Significantly more time per prospect
- ⊙ Little pressure to educate the customer on product knowledge
- ⊙ The reps KSAs: Interviewing skills, developing a rapport.

CONSULTATIVE SALES PROCESS

- ⊙ Research
- ⊙ Establish Rapport
- ⊙ Define Their Situation
- ⊙ Assess Their Situation
- ⊙ Setting Strategy
- ⊙ Present Solutions
- ⊙ Obtain Commitment
- ⊙ Follow Up

CONSULTATIVE SALES PROCESS, CONTINUED

1. Research = Preparation [See list on slide 18](#)
2. Establish Rapport – Predicated on expertise
3. Define Their Situation – Initial appointment, open probing question to identify the areas of highest value (aka – what keeps them up at night) [See Check List starting on slide 19](#)
4. Assess Their Situation – Validate and define their concerns or issues, further investigation if needed. Must obtain clarity at this stage.

CONSULTATIVE SALES PROCESS, CONTINUED

- ③ Setting Strategy – Identify your resources and how best to apply them to solve the specific issues of the business. [See Action Plan on slide 21](#)
- ③ Present Solutions – Specific actions with time table and expected deliverables to the highest person of authority as is possible.
- ③ Obtain Commitment
- ③ Follow Up

HURDLES TO OVERCOME

- ③ “Driver” personality type, “just give me the pitch already”.
- ③ Presumption of workforce’s capability.
- ③ When the company has an issue that they aren’t aware of.
- ③ Staff wants to pitch vs listen.

BENEFITS

- ⊙ High percentage of engagement.
- ⊙ Per business much greater levels of engagement.
- ⊙ Long term relationship with the businesses.
- ⊙ Referrals!!!!

CONS OF CONSULTATIVE SALES

- ③ Labor Intensive
- ③ Sales Staff Exclusivity
- ③ Time Management
- ③ Metrics and Tracking

MANAGEMENT TIPS

- ③ Goals align with the strategy
- ③ Who would be best to hire
- ③ CRMs
- ③ Industry reports
- ③ Staff Development

ADVANCED MAGNETIC LAB

CASE STUDY

Advanced Magnetic Lab is a high tech small business, of 10 employees, that mostly specializes in the development and manufacturing clean energy products. Projects that their scientists have been working on include: wind turbines, more efficient aircraft power plants, and magnetic controls. Though ALM is a small business Mark Senti their President is a regional peer leader within the industry sector.

Valarie, a Business Liaison for Brevard Workforce was assigned to the Clean Energy sector. At that time Brevard Workforce had very little engagement in the sector and Valarie's focus was to develop the systems position as a resource for those companies. In attending the initial meetings of an industry consortium she met Mark and started the Consultative process.

ADVANCED MAGNETIC LAB

CASE STUDY CONTINUED

In the initial meetings it became clear that ALM wasn't in need of the standard workforce services. They weren't hiring their staff were industry leading scientist and didn't need training. At that time, as it is today, venture capital was the primary need for ALM. Initially Valarie was able to assist ALM with business referrals and research assistance for grants applications. Within a year and half from their initial meeting ALM has starting recruiting through Brevard Workforce and started 6 OJT placements. Additionally, Mark has become a board member, has been a presenter at an all staff training event, has been active in numerous workforce initiative, and has referred new businesses to Valarie.



**UNION PACIFIC RAILROAD and NORTH PLATTE CAREER CENTER
PARTNER TO PROVIDE A UNION PACIFIC RECRUITING STOREFRONT**

Current Situation: Union Pacific seeks to hire approximately 20 new employees per month at the North Platte location in positions classified as "Train Crew / Train Service". Positions are advertised, applications are submitted online, and prescreened. Union Pacific currently sends a staff person to North Platte from Omaha each week that receives applicants at a local hotel, and takes the applicants through a job overview, application review and a policy review. A thirty minute reading test is administered, after which applicants are informed whether they pass or fail (applicants are required to pass in order to proceed to an interview). Individual interviewing then takes place, with the participation of a local UP manager, and a job offer is extended to those meeting the qualifications. Post-offer requirements (e.g., physical exam, color vision exam and drug test, physical ability test, and background check) are completed after a contingent job offer is accepted.

Union Pacific Pilot Program: Union Pacific is interested in piloting a recruiting "storefront" location that would allow more access and flexibility to accommodate new applicants. The North Platte Career Center would also act as the "Employment Manager", performing the functions now provided by Union Pacific's Employment Manager traveling each week from Omaha.

Pilot / Trial Period: Union Pacific Railroad and Nebraska Workforce Development-Department of Labor (also referred to as "North Platte Career Center") have negotiated a pilot or trial period from January 1 – June 30, 2007 (extended through December 31, 2007) for Train Service hiring. We anticipate success during this trial period and hope to expand the partnership to allow the North Platte Career Center to assist UP in hiring for other positions. Union Pacific will remain actively involved through the transition.

UNION PACIFIC RAILROAD CASE STUDY

Union Pacific Railroad Primary Accountabilities	North Platte Career Center Primary Accountabilities
<ul style="list-style-type: none"> • Determines number and types of positions needed in North Platte • Prescreens applications and determines which applicants will be invited to a hiring session at the North Platte Career Center • Contacts and invites only qualified applicants to a hiring session at the North Platte Career Center • Makes offers to recommended applicants • Manages post-offer requirements with the contingent new hires 	<ul style="list-style-type: none"> • Acts as a contracted railroad Employment Manager • Provides application assistance and internet access for walk-in applicants • Interfaces with applicants in UP hiring sessions, managed by the North Platte Career Center • Administers applicable employment and selection tests and conducts interviews of qualified applicants with a local UP manager • Explains post-offer requirements and details to the contingent new hires • Facilitates new hire processing session to the contingent new hires



**UNION PACIFIC RAILROAD and NORTH PLATTE CAREER CENTER
PARTNER TO PROVIDE A UNION PACIFIC RECRUITING STOREFRONT**

UP Storefront Address:

Nebraska Workforce Development
302 E. 6th
North Platte, NE 69101

Hours of Operation:

Walk-in Applicants / Online Application Completion

Union Pacific accepts job applications online at www.unionpacific.jobs. Applicants needing personal assistance with the online application process can apply for *any* Union Pacific job vacancy at the North Platte Career Center anytime Monday through Friday between the hours of 8:00 a.m. – 5:00 p.m. (Applicants will still have the option of applying online anytime, at their own convenience, anywhere there is internet access).

Application and Information Sessions

To learn more about the various job opportunities (not limited to Train Service) at Union Pacific, interested applicants can attend an *Applicant Information Session (AIS)* at the UP storefront location. Beginning on March 7, and every Wednesday thereafter, applicants can attend a session anytime between 1:00 p.m. – 7:00 p.m. Presentations begin at the top of each hour.

Online Reading Test Administration

The North Platte Career Center will also administer the online reading test. Only the Train Service applicants who are considered qualified will be invited to the North Platte Career Center to take the online reading test. These applicants will be able to schedule a time convenient for them to take the test.

Weekly Schedule for Hiring

Beginning the week of February 19, UP will prescreen and invite only qualified applicants to the North Platte Career Center (rather than a local hotel) for a hiring session. Depending on the applicant pools, we will utilize either a 2-day or a 3-day schedule as defined below.

2-Day Schedule

- Wednesday – All day (Invited applicants will arrive ~ 7:00 a.m.; Session begins at 7:30 a.m.)
- Thursday – All day (Invited applicants will arrive ~ 7:00 a.m.; Session begins at 7:30 a.m.)
- Friday – New hire paperwork session (2 hours) (Only necessary until we move this online)

3-Day Schedule

- Tuesday – All day (Invited applicants will arrive ~ 7:00 a.m.; Session begins at 7:30 a.m.)
- Wednesday – All day (Invited applicants will arrive ~ 7:00 a.m.; Session begins at 7:30 a.m.)
- Thursday – All day (Invited applicants will arrive ~ 7:00 a.m.; Session begins at 7:30 a.m.)
- Friday – New hire paperwork session (2 hours) (Only necessary until we move this online)

UNION
PACIFIC
RAILROAD
CASE STUDY
CONTINUED

RESEARCH ITEMS

KNOW BEFORE YOU GO

1. Industry (NAICS code)
2. Company culture
3. Public or private?
4. Family-owned vs. employee-owned?
5. For profit or non-profit?
6. Union or non-union?
7. Large, medium, or small?
8. Established organization or a start-up?
9. Layered structure (bureaucratic) vs. flat structure (entrepreneurial)
10. Local, regional, national, global?
11. Urban vs. rural locations
12. Federal government contractor vs. non-federal government contractor
13. Common occupations and knowledge, education and skills required
14. Current job openings / hiring activity (labor demand)
15. Downsizing or layoff activity
16. Labor market information (labor supply)
17. Latest news events
18. Corporate foundation / charitable activities
19. Key leaders
20. Core values, strategy and mission (annual report)

The client's business: overview

- ⊙ What sector are they in?
- ⊙ How are they positioned in their field?
- ⊙ What is their overall business strategy?
- ⊙ What are their specific objectives? (short, medium and long-term)
- ⊙ What will be the impact of these on their business and performance?
- ⊙ How well are they performing at present?
- ⊙ What are their specific issues at the moment?

The client's business: project/initiative

- ⊙ What are the objectives for this project/initiative? (short, medium and long-term)
- ⊙ What is the desired effect of this project/initiatives on the business?
- ⊙ What are the potential down-sides?
- ⊙ What will be the financial implications on the business? (Savings, increased profits, etc)
- ⊙ What is the cost justification? (Consider the short, medium and long-term)
- ⊙ What is the business justification?
- ⊙ What are the risks of the project?
- ⊙ How have they reached the decision to pursue this project/initiative?
- ⊙ What functions or departments are involved?
- ⊙ What is your relationship with these departments?

Check List

From
Solutions 4
Training
Limited

Check List

From Solutions 4 Training Limited

Continued

The client's marketplace

- ⊙ Who are their main competitors?
- ⊙ What are they doing, strategically and tactically?
- ⊙ What are the trends in the marketplace? (local and beyond)
- ⊙ Who else are you working with in this market?
- ⊙ What effect will this project have on the client's position in the market?

Your capability and performance

- ⊙ What experience have you in this market?
- ⊙ What experience do you have with this type of work?
- ⊙ What expertise and resources can you offer to the client?
- ⊙ What do you know about the benefits and risks for this type of project/initiative?

Your potential solutions and approach?

- ⊙ What do you feel might be some other issues the client may face?
- ⊙ What alternative solutions can you suggest?
- ⊙ What will be the benefits to their business of your solution?
- ⊙ What will be the benefits of your alternative solutions?
- ⊙ What will be the consequences of these?
- ⊙ How can you present yourself, and your company, to the client to show that you understand their business objectives and can help to achieve them?
- ⊙ Where can you find more information to help you with this client?
- ⊙ What would this information be?

Business Service Plan

Company:	ABC Company
Contact:	John Smith - Manager 555-4444 12 St. Cocoa, FL 32922
Rep:	Jane Dow



Business Need:	Services to be provided:	Action steps and associated services:	Task Owner:	Expected outcome:	Results:
Hire 12 technicians	Job Posting	Write job description	John Smith	Done by date	
		Review wages	Jane Dow	Done by date	
		Post job in database	Jane Dow	40 qualified referrals by date	
Training of new employees	Employed Worker Training	Send documents for review to company	Jane Dow	Done by date	
		Identify Training Vendor	John Smith	Done by date	
		Complete Eligibility	John Smith	Done by date	
		Complete Contracts	John Smith	Done by date	
		Start Training	John Smith	Date	
		Finished Training	John Smith	Date	
		Gather Certifications	John Smith	Date	
		Invoicing	John Smith	Date	
		Payment	Jane Dow		

RESOURCES

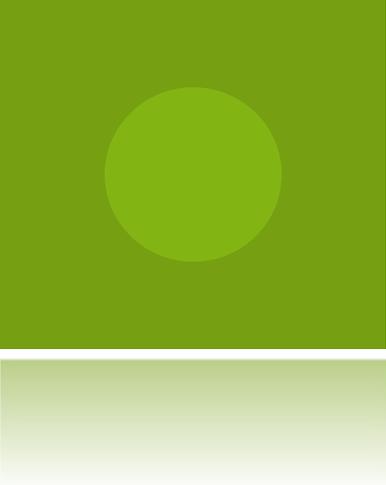
FIND & RESEARCH EMPLOYERS

1. Hoovers.com (*offers Company Profile Reports—see sample report*)
2. Glassdoor.com (*search company data, reviews, and interviews all posted anonymously by employees*)
3. USASpending.gov (*find federal government contractors*)
4. Employer Associations (*join, if possible, or offer to speak at meetings/conferences, and follow Associations on Facebook or Twitter*)
 - Local and State HR Associations
 - Direct Employers Association
 - Society for Human Resource Management
 - Staffing Associations
 - National Industry Liaison Group (NILG) and Regional ILGs
5. Set Google Alerts on Employers
6. Join HR-Related, Employer and Association LinkedIn Groups
 - Employers share challenges and solutions with each other.
 - Engage in key discussions and share success stories.
7. Explore company websites (*annual report*)
8. Guidestar.com (*find info on non-profit organizations who are also employers and potential partners*)

RESOURCES

CUSTOMER RELATIONSHIP MANAGEMENT (CRM) SYSTEM

- Company name and address
- Company's key contact names, job titles, phone numbers, and email addresses
- Federal employer identification number (FEIN)
- NAICS code
- Company description
- Company size
- Url address of the company's career page or employment website
- Company locations (e.g., cities and states)
- Common occupations (e.g., the top 10-20 most in-demand jobs at this company)
- Track requests for particular skills needed by employer
- Relevant partnerships or affiliations this company is engaged in
- Awards this company has received (e.g., for hiring guard, reserve and veterans, being a military-friendly employer, etc.)
- The Business Services Manager assigned as the representative to the employer
- Schedule periodic contact (emails, phone calls, visits) to stay connected to the employer
- Document and input contact notes and services needed for appropriate follow up



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