Blog Transcript: How To Stay In the Driver's Seat During a Sales Conversation

Hey there, Allison Davis here, sales consultant for founders who want to hit their goal and keep on growing. I'm recording a video today because during March's Sales Roundtable, which of course is a virtual gathering for founders to come ask their pressing sales questions and move business forward, there was one question submitted that I didn't get to in the q&a. It's such a good one, so I'm recording my response and sharing it out.

And the question comes from Rachel. Rachel is a UX/UI design specialist, has her own shop. And our question was, "How do you stay in control of the sales conversation and keep it from turning into an interview?"

This is such a good one. Because first, let's make this universal for everyone who's watching this, right? Let's understand what a sales conversation needs to be. Now, of course, there's a lot of strategy and nuance, depending on what you do and who you sell to. But at a 30,000 foot view, the purpose of any sales conversation is to help the client understand where they are today, where they want to go, and what's standing in the way. You may have heard about that gap — the gap between where they are and where they want to go. Because once we know that, and we know what's holding them back, then we can talk about our work, our services, the results that we bring in relation to their specific needs. And that is always going to be a better approach than coming in and doing some sort of presentation or coming in and answering interview questions where it's a one sided conversation.

So if you've had that experience of it, feeling like an interview of them expecting you to just present and they're not really going to participate at all, or if you feel like you're being treated like a vendor, and not like the subject matter expert, and professional you are, these tips that I'm going to share with Rachel are for you, too.

So two things for you, Rachel, the first is setting an agenda, which is also setting a tone, right?

You are the subject matter expert here. And so you should lead this conversation, because chances are your buyer doesn't know how to lead a, you know, a meeting about UX UI. And so you can set an agenda ahead of time, really setting that expectation about what's going to happen at the meeting. Or you can keep it light and breezy, and you can do it when you get on the call.

So when you get on any kind of sales call, there's going to be report: "So glad so and so introduced us now, where are you based? Oh, I went there once so great." All right, you got a little rapprt going for a minute or so, and that's awesome.

And when it's time to shift into the real conversation, you can say something like:

"Well, we've got about 45 minutes today. And what I find works best is if I could ask you a few questions to you know, quickly understand what's going on for you, get a lay of the land, that

would be great. So that when I do share about myself and my work, which I'm happy to do, I'll share the most relevant bits, you know, so this would be a really good use of your time. And then of course, if there's any next steps we want to plan together, we can do that, before we hop off, how does that sound?"

Now, was that super articulate? No. Did he get the job done? I think so.

I did three things there. Did you catch them off?

Number one, I set the agenda. I'm not a dictator. I'm not in total control of this conversation. But I'm signaling that I know what I'm doing. And you can trust me to lead you through a conversation in an area that you're likely not as confident in. And that goes a long way.

Number two, I made it known that they're going to talk first, I'm going to be asking the questions, right. But did you notice that I gave them a value proposition? In exchange, I'm going to ask you questions so that when I talk about myself, I'm only going to share the most relevant bits for you, you know, we're gonna make a good use of your time. It's for them, it's not for you, right.

And last, but not least, I said, and then at the end, if we want to plan any next steps together, we'll be sure we leave time. What have I done, I put myself and the other person on the hook to pause before we have to hop off and say, Are there next steps to be done here? Because how many times have you run right up against time? And just below as soon as Y'all follow up on email? And then you get in a follow up loop? Nope. Every next step has to be made before you get off that call.

So with that one agenda, you have done yourself three huge favors. So try that agenda.

Next. If they get asking you a bunch of questions, you have to respectfully respond, but then turn it back on them. To ask them a question, right. So someone might say to me, "Allison, how many creative agencies have you worked with like ours?" In that moment, I have so much empathy for them, right? Because they're nervous, they have a big job to do. They want to make sure I'm the right one, right. And so in that moment, I could go on a 10 minute tirade about how many, you know, agencies like theirs. I've worked with the results I've gotten. But that would be a mistake. I'll do that later. Right now, I need to hear more from them before I know what to share about myself and my work. But you can't be a jerk and be like I said, I was asking the questions here. No, you're gonna respond respectfully, but then you're gonna turn it back on them.

"So Allison, have you worked with agencies like ours?" I would say something like: "Yes. Well, I think I have, I think I have worked with agencies like yours to do exactly what you're hoping to do, which is to bring new leads into your pipeline, right? But I want to make sure that actually I have so I've got a question for you. Tell me more about…"

That's how you do it, set an agenda, and then respond respectfully to those questions, but turn it back on them.

I hope this has been useful for you. If you have any follow up questions, hit reply and let me know I'd love to hear from you.