



BEST PRACTICES – NEEDS ASSESSMENT

BELLWETHER FOOD GROUP, Inc.

April 2016

This is the second of five articles around best practices in sales (the first of two on the needs assessment). This article will address the why and what of the needs assessment process.

NEEDS ASSESSMENT PRINCIPLES & PROTOCOL

The most successful sales people have developed and mastered one essential skill: the ability to conduct effective needs assessment discussions. This also happens to be the one skill successful sales people continue to work on, develop, and practice during their entire careers.

A needs assessment discussion is a meeting where the entire focus is on the customer, their business, and their business needs. In an effective needs assessment discussion, the sales person doesn't talk about their company, their products, their capabilities, or potential solutions to the needs of the customer. The entire goal is to collect information about the customer and their issues – NOT to talk about your company or to offer products. That comes later in the overall sales process.

The needs assessment discussion is fundamentally a mindset. It is the path towards the truth and long term accessibility. It provides insight and perspective about the reality of the specific opportunity in its current environment. The needs assessment approach is a significant shift from traditional, or legacy, sales processes that are based on telling the customer about the features and benefits of your products, or why your products are better than the competition. For many career sales people, and their managers, this approach might at first seem counter-intuitive.

However, mastering this skill and embracing it enhances the context and quality of business relationships. Those who master the skill become proficient at listening to customers and learning about their priorities – something every customer and prospect values. At first, it might seem like the needs assessment process is adding time and effort to the sales cycle. Customers are busy - they don't have time for some long, drawn out conversation, do they?

The reality is the needs assessment discussion will *shorten* the sales process because all you will be focused on are the immediate needs and issues of your customers. Once you become proficient at the process, you will soon see and experience the quality of your business conversations improve. At the same time, you'll gain valuable insights, because the customer is doing all the talking.

Boston **Dallas** **North Carolina**
617.281.5175 773.255.6466 843.422.4285

What causes most sales proposals to falter is a poor or incomplete understanding of the **customer's** organization, politics, constraints, and priorities. As a result, the proposal misses the mark, addresses the wrong issues, or speaks to the wrong stakeholders.

Four Elements of the Needs Assessment Discussion

The needs assessment discussion is comprised of four basic elements, all designed to get to the true needs of your customer or prospect. They are:

1. Spending time with your customers to ***understand their needs***
2. Gathering as much information as possible to understand what the chance of success is at this time
3. Listening — not talking about your brand, company, solutions, or capabilities
4. Finding opportunities to capitalize on in the future

Strategy of the Needs Assessment Conversation

The strategy is to get the other person to think about and share what is on their mind – the truth. Only when you are addressing the right topic will your ideas be received. Otherwise, you run the risk of getting a negative reaction to:

- A perceived or actual sales pitch
- Pressure to do something against their will
- An expectation of the other person doing something they are not qualified to do (selling up within the organization, or make a buying decision) or take actions that could be politically risky for them
- Products or solutions that don't fit with their organizational goals or culture
- Something they don't understand
- Something in which they simply aren't interested or don't have the authority to act on

When you take a needs assessment approach, one of the first things customers or prospects will notice is that you are much different than the other sales people they have encountered.

Your actions, including information gathering and genuine listening, demonstrate you are willing to invest in what is important to them. You become a potential resource, someone who is a listener and a problem solver, not an aggressive nuisance. By demonstrating your desire to understand their needs two things happen:

- You begin to find out the ***real issues*** and ***their definition*** of success.

- You start to gain insights for your own benefit and you can determine very quickly how much energy and time to invest in this opportunity.

The needs assessment discussion involves getting permission to ask questions. This demonstrates respect, allows you to set the tone and expectations for the discussion, and immediately lets the other person know you really intend to listen to them. Over time, you develop a relationship built on trust - which leads to the truth, and what really matters to them. Then, and only then, can you build solid business opportunities if there is a match between what you can offer and what they need.

If there's not a fit, or you learn from the conversation that this one individual is not the right person to be connected with, you'll see that very clearly. As a result, you won't waste time on an unqualified opportunity, or invest too much in someone who can't help or make anything happen.

Sincerity, Venting, and Truth

If the approach of conducting the needs assessment discussion is done well, the customer will transition through three distinct phases - sincerity, venting, and truth.

We'll talk about how all of that works in the next article.

Founded in 2007, Bellwether Food Group is best known for our Restaurant Brand Architecture work for Chain Restaurants, Social Media Chat Mining, growth strategy and professional sales skill development work for manufacturers, and pre-acquisition due diligence work for private equity firms who invest in those industries.

A client adopted the Silent Selling approach. Following the workshops and field work, over the next 12 months, they sold 46 new regional chains vs. 22 in their plan. The national accounts group tripled their target for sales growth (in dollars) in new business during the same time period, which resulted in over \$3 million in new revenue.

"[Silent Selling, Listening for The Sounds of Success](#)", is Mac Brand's book describing our unique approach to sales. See more on our website: www.bellwetherfoodgroup.com. To learn more about how this could work for your organization, give us a call.

Mac Brand	mbrand@bellwetherfoodgroup.com ;	773-255-6466
Rob Hardy	rhardy@bellwetherfoodgroup.com ;	617-281-5175
Jon Jameson	jjameson@bellwetherfoodgroup.com ;	843-422-4285