BEST PRACTICES – NEEDS ASSESSMENT GUIDELINES

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This is the third of five articles around sales process. (And the *second* of two articles on the needs assessment process)

NEEDS ASSESSMENT INTERVIEW GUIDELINES
The word “interview” is important. The goal is get the other person’s perspective, what they know (or don’t know), how they see the situation, the role they will play (or not) in the actual decision making process, and what success “looks like” to them.

One important point is critical. The person you’re talking to might disqualify himself or herself (sometimes without even realizing it!). That’s perfectly fine. If they can’t (or won’t) make the decision or aren’t the right person, then you now have the knowledge and the confidence to not over-invest with this person or with this opportunity.

The mindset one must have is one of gathering insight, perspective, and information versus employing persuasion or influence. Eighty percent of communication is nonverbal, including body language and the emotional tone of the discussion. In conducting a needs assessment interview, use these guidelines:

- Make the discussion all about them
- Begin with a long view and then drill down based on where the customer takes you
- Err on the side of wide-open questions
- Take notes - *bring a blank note pad and pen*
- Use the silence. If they pause after a question, that means they are thinking – don’t interrupt that by talking
- Follow your interpretations of the customer’s answers – this is a great time to ask for clarification or more detail
- Never assume – ask if you do not understand something. It might be a critical decision factor, and the customer doesn’t expect you to know everything about their business – how could you?
- Keep the discussion adult-to-adult – don’t try to make them happy, or appease them if they aren’t
- Stay on their level – not too fast, slick, or polished
- Non-verbal cues matter!

The sales person has a greater influence on the emotional tone of a customer meeting than you might realize - if you have a solid protocol and operate within your own professional standards, you can influence the overall tone more than you think.

THE 80-20 RULE

The 80-20 rule is an effective way to think about conducting needs assessment interviews. You want the customer to do 80 percent of the talking, while you limit yourself to 20 percent. If you can stay within that threshold, you will usually get the insight you need in the first meeting to easily determine what to do (and more importantly what ***not*** to do) next.

You will find that many customers simply are not accustomed to actually having someone really listen to them. It might take them some time to get used to this.

The key is to really listen and prove that you are listening. That can be accomplished by:

- Not interrupting or jumping in with a solution
- Summarizing and clarifying what you have heard
- Taking notes when appropriate
- Using silence to let the other person process what they have heard

Listening is a powerful skill that can have major implications for a sales strategy. Almost immediately, you can expect to notice some differences from a typical sales call.

- Customers will be more receptive to you
- You will identify opportunities that did not exist before
- You will realize some existing opportunities are not a good fit
- You will learn much more about each customer - faster

When you ask the customer or prospect for help, clarity, or more details – provided you are sincere and they sense that – they will help you almost every time. If they won't, that is telling as well.

The most important point to remember in this conversation is that you can’t behave like a typical sales person focused only on what is important to you. Your focus and behavior must be on truly understanding the other person’s needs, issues, priorities, and concerns. When they see that you really are interested is when the information flow begins.

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SINCERITY, VENTING, AND TRUTH

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

Sincerity

This is the first phase when the other person is thinking subconsciously that this discussion is going to be like most other sales conversations, based on their own life experience. (*When is the pitch coming?)* It's your job to be sincere and let the person see, by your actions and practice of the 80-20 Rule, that you are *not* trying to "sell" them.

They are expecting the interruptions and, at this point, not even considering the possibility that you are going to listen to them. That's because few other sales people do.

On a typical sales call, this is when you get cost questions or some other behavior or tactic designed to end the conversation. This is a version of the flight or fight syndrome - bodily changes and behaviors designed to minimize the perceived threat - which in this case is sales pressure.

This sincerity phase is the most critical as this is when the defense mechanisms begin to loosen up. Expect about 10-20 minutes of demonstrating sincerity before moving on to the next phase.

Venting

In this phase the other person begins to believe they can let their guard down and the real information and insights begin to flow.

This is another place in the discussion where you might be tempted to jump in with a solution or some advice. Don't! You will cut off the flow of information, and worse, their thought process, and you will prove to them that you haven't been listening.

A normal range of expectations is that this phase takes 10-20 minutes, although we have had this phase take as long as 30 minutes.

Truth

Finally, at the end of the conversation and after the other phases, you tend to get the real truth and find out what's really important to the other person. There are a couple reasons why this takes time.

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First, the other person must process whatever issues they have to get to some resolution. Most people need a period of time without interruption to let their minds work. Second, the privilege of having someone actually listen is, for many, quite therapeutic.

After someone has spoken their mind, most people tend to relax. That can be a major advantage for your sales person in understanding the truth about this person's beliefs. While the truth might not be the answer you hoped for, at least you have the truth — or this person's vision of it.

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", ©2010, is Mac Brand's book describing our unique approach to sales. If you want to learn more about the needs assessment process, please call us or see more on our website: www.bellwetherfoodgroup.com

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