



# Building an Effective Sales Organization

Delivering a Sales Presentation  
in a Virtual Environment  
&  
Levelling Up Your Sales Leadership

*Please pass on this training memo to anyone who will benefit.*

October 7, 2020

## WHERE DO YOU HAVE CHALLENGES IN SALES PROCESS

Identify Valuable Targets

Getting Introduced

Preparation & Presentation

Address Client Concerns

Closing the Sale

On time Payments

Follow Up Additional Sale

Referrals



# TOWARDS A MORE EFFECTIVE SALES ORGANIZATION

- 1 Set 6- month sales forecast & organizational expectations. Breakdown forecast into monthly goals and weekly activities.
- 2 Monitor, Recap and Reset for the next week. Hold Organization Accountable.
- 3 Be clear on your value proposition why you vs. someone else. The importance of the Story.
- 4 Identify high quality targets
- 5 Research & Prepare. Insights about client business. Creating the hook. Be Ready.
- 6 Elevator Speech and the longer Presentation. Active Listening. Watch the Talk to Listening ratio. Watch the room.
- 7 Understand the client decision-making process
- 8 Speed & Responsiveness. Follow Up & Persistence.
- 9 Stick around and look for new opportunities and to ensure no one is muscling in on your business.
- 10 Get the ongoing feedback. Get the referral.
- 11 Celebrate the Wins!
- 12 Enabling Technologies especially Customer Relationship Management (CRM) Software to track state of conversation and learning.



# DELIVERING A SALES PRESENTATION IN A VIRTUAL ENVIRONMENT

**Beverley Thompson, CEO & Award Winning Sales Trainer and Strategist  
Hulaine Strategic Services**

Whether you are a business owner or sales executive you will need to present your product or solution to someone else, to get them to purchase from you or buy into your idea. Here are a few critical steps you must take to increase your chance of being successful.

It is natural for us to be excited about our solution but sometimes we get lost in what we know and we forget that it is the potential client who is the focus of the conversation. We sometimes prepare our pitch and forget that we are not presenting to ourselves. **It is the audience or person that needs to believe in what we are doing or to be persuaded that your solution is the best alternative now.** The best presentations or pitches focus on the needs or aspirations of the person you are presenting to. Because whatever the solution or product you are presenting the audience needs to understand:

- Why they should buy this solution/product;
- How your product will work in their favour or their current situation;
- What results or outcomes your solution will deliver.

You need to PREPARE for the presentation and DELIVER and ENGAGE in the presentation.

Here's how to prepare for the presentation...





# DELIVERING A SALES PRESENTATION IN A VIRTUAL ENVIRONMENT

**Beverley Thompson, CEO & Award Winning Sales Trainer and Strategist  
Hulaine Strategic Services (cont.)**

## DO YOUR HOMEWORK AND YOUR RESEARCH

### 1. Ensure you know who your audience.

Let us say you are one of the suppliers that sells printers to a company that has five retail locations. You have always wanted to speak to the people who make the plans for the business. You requested to speak to the operations manager who is responsible for all locations. You want to deepen your relationship and gain access because you want to open the wallet share and sell bigger and longer-term contracts. You got the go ahead to present at their next management meeting.

The operations manager will be in the presentation for sure; but who else will be there?

- Are there key decision makers in that meeting?
- Are you presenting to the finance person?
- Are you presenting to the person who will feel the impact of any changes your solution will bring about?
- What are they hoping to achieve from your presentation? You need to answer this question or close this gap in the presentation for each person.

Take the time to find out who you are presenting to, so you do not miss out on the opportunity to meet your objective of making further inroads in that company and increase sales.



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Hulaine Strategic Services (cont.)**

## **2. Know what the key decision factors are & what you want from the meeting.**

Take some time to check in with existing relationships you currently have or ask for 15mins with the operations manager. Let her/him know that you want to use their time wisely to focus on the things that make sense for them.

### **You would want to know a few things:**

- Why are they saying yes to your meeting now?
- Are they seeking to save, get better terms or expand?
- What is the business strategy or direction?
- Are they seeking to select a vendor now or are they in the early phase of research?

You cannot know the information unless you do some checks using your internal contacts, industry publications, social media, and business news.

The magic is not in the printing options that you have; It is whether you will credibly articulate how you will solve their current problems or enable their business priorities.



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Hulaine Strategic Services (cont.)**

## **3. Get insights on the company and their industry.**

- What is changing, what is new, what is evolving?
- How are their customers' demands changing?
- What does the competition look like in their space?
- How have they re-prioritized since the pandemic?

Covid-19 has shifted our work, life, and family existence as we know it. We all operate differently compared to 7 months ago. With more people working from home and children learning from home there is a greater demand for printers.

In your research you will need to extend yourself beyond your products, and overreach into your customer's ecosystem. You need to know their pain, aspirations, challenges because you must genuinely know what they are going through to develop a solution and present to them how you will make their lives easier.

The information you gather will help you to frame your presentation so that it matches your audience perspective. You will enroll them on your side because you are speaking their language and will demonstrate sincerely that you are a partner for the long haul.



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Hulaine Strategic Services (cont.)**

## **4. Prepare to Engage in the Virtual Environment.**

Seven months ago, you would have driven to the location and say hello to the people you passed on your way to the receptionist. You chatted with her, made your way to the meeting room and while you are setting up your laptop you are probably making small talk with your contact. As people entered the room you shook hands, made introductions, and built rapport.

***Fast forward to October 2020 – FACE TO FACE CONNECTIONS  
DISAPPEARED! But the show must go on.***

In face to face you would have checked on the location, parking, and the room. This is no longer required. However, you still need to establish yourself as a credible source. **Here are a few ideas to ensure you take command and show-up with your best self:**

- Send an agenda and share it with the client. Ask for their input. This sets the tone.
- You may not be able to have the usual one hour meeting you were accustomed to in face to face. People are 'zoomed' out these days. This forces you to focus and be on time and on point. Sales prospecting meetings have been cut down to 40mins or less. If your client is really engaged, they will continue pass the allotted time, and you go with the flow. But remind them that you want to be respectful of their time.



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**Beverley Thompson, CEO & Award Winning Sales Trainer and Strategist  
Hulaine Strategic Services (cont.)**

## **Ideas to ensure you take command and show-up with your best self for virtual sales presentations (cont.):**

- Confirm which video conferencing platform your customer is accustomed to.
- You can send a simple 'join meeting' guide if you are using your platform. Set a 10 min time in the agenda for joining and any challenges anyone could have.
- Can you adjust to the platform they use? You want to make the experience great for your customer.
- If you must use your customer's platform, talk to someone, and ask them to walk you through the features. You must get comfortable so you can engage with confidence and not get flustered.
- Practice your presentation in the virtual space with a colleague or friend. Let them tell you how you are coming across. Sometimes what we intend to communicate is not always understood.
- You must practice so you connect and come across as being relatable. That means you need to practice looking directly in the camera while you speak. It can be very awkward at first, but you will get used to it.
- Ensure the face of your camera is clean and your volume is good.
- Also check your lighting to ensure you can be seen clearly.

While keeping all these things in mind you will show confidence and that you know your stuff. Goodluck with your next sales presentation!



# LEVELLING UP YOUR SALES LEADERSHIP

**Zachary Harding – Executive Chairman, Delta Capital Partners and Group CEO, Stocks and Securities Limited (SSL)**

The success of any venture tends to hinge on having the right team aligned with the right vision, but most importantly under the right leadership. My experience leading teams in companies like Wisynco, ATL, and Red Stripe has given me a great deal of exposure to some of the most elite high-performance teams in the region, and with sales and marketing being the core revenue driver for most companies, the level of leadership within a given sales team becomes a close indicator of their performance. You can almost predict the trajectory of a company's revenue by having a 15-minute conversation with their head of Sales. The truth is that if all other things are equal, it is often the leadership of a team that really determines its ultimate success.

A strong sales team is the backbone of most businesses, and in a competitive marketplace, a strong company will invest in leaders that know how to keep their teams performing at optimal levels.

But what makes a good Sales Team Leader?

Exactly how do these rainmakers make it rain?

I will share five tools that I have learned through observation of other successful leaders and execution by some of Jamaica's leading brands.



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- 1. Study Your Cards-** As a leader, you need to understand what resources are available to you. One must budget appropriately for tools such as marketing, branding and promotions, and any leader should have a clear picture of what they have in their kitty. For a Sales team leader, your most valuable resource will always be the personnel on your team, and you should be able to assess their strengths and weaknesses without emotion, both individually and as a group. How do they work together? What causes them to divide? Who are the influencers? Answering these questions can allow you to form focused sub-groups, to delegate effectively, and most importantly, to keep the peace.

Teams need to gel, and the leader is responsible for creating the culture and structure of how the team should interact. Leadership in this respect does not however mean forcing people to conform to your vision, but rather understanding who they are and seeing how best their strengths can support that vision. Such a leader will need to spend time with their team to get a baseline read on their natural dynamics, before they can adapt or enhance it.



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- 2. Know What Drives Your People-** Any leader worth his salt knows that the task is never as hard to manage as the personalities carrying it out. You must remember that your team is made up of unique individuals with their own personal desires and motivations. Good sales leaders therefore will not only be able to identify the key players on their team, but also to understand what “gets them out of bed in the morning”.

At a human level; take an interest. If your star salesperson works in order to fund his rock-climbing hobby make sure that once he is performing he gets reasonable time off to climb rocks. If your star sales manager is family focused, make sure to welcome their kids when they visit the office. At a professional level understand that each person may need a different approach to keep them moving. Ask yourself, who responds best to positive vs negative motivation? Who is a self-starter and who needs a pace-setter to keep them running? When do we need some pressure to increase our urgency? When do we need a break to let loose and blow off some steam?





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- 3. Straighten your Aim** – General knowledge teaches us that to chart a course you will need an end point. Your team will need a clear goal or ambition to move toward. Not only will this help them to focus, but it will also help the entire team to gauge their own performance. Setting Sales Targets can however be tricky. Too high and nobody bothers to try, and too low you might be short-changing yourselves, or worse your competition picks up the slack. Depending on the size of the team it can be helpful to divide your target by product, department, geography etc. In doing so, you allow the team to be united in meeting the target figure while also feeling confident that they can actually reach their goals. These short-term victories are what bring job satisfaction and create an appetite for winning that is the true key to a stellar team.
  
- 4. Get in their Corner-** If you believe in your team, they should feel your support. This means that your team should feel just as safe discussing their victories with you as their defeats. Your role, as they endure inevitable pitfalls will be to help them to see gaps, and to navigate challenges. I recall one scenario when I was working in Manufacturing. There was a product which had plateaued in revenue. As usual the team wanted to discount the item to drive purchase, however a price cut would have eliminated the profits. As a Leader it was my job to get the team back on track, as well as to reignite their passion about what they were selling. After I listened to their complaints, we pivoted into solution mode and we were actually able to lobby for an update to the product which not only saw revenues shooting up, but which revolutionized that company's product roster. If I had not gone to bat for my team, not only would they have missed their target, the company would have missed a massive earning opportunity.



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- 5. Sweeten the Pot** – Critically, in order to ensure success, you must incentivize your sales team. Companies lose the most when they lose a star salesperson. Often such a loss is simply due to them getting a better offer elsewhere. Pay attention not only to what your competition is doing in the market, but to how they are compensating their team and try to operate as close as you can to, or even exceed industry standards.

That said, not every business is able to pay at market value, in which case I encourage you to get creative with perks and benefits. Globally we have seen companies like Chobani and Southwest Airlines giving employees a stake in the company which is a great concept if you have that type of structure. For a simpler model there is a lot you can do without a big budget. Things such as retreats, team bonding activities, personal development training, company awards, and simple respect can go a long way in keeping your team happy until you can afford to pay them according to their true value.

Sales like any field will always thrive under good leadership. In all the points above the one connective thread is that a strong leader is tuned into the emotions of the team. We must learn to speak with the same voice as our team, and in order to do that we must truly understand who we are leading.

Always remember this, managing a team, does not automatically make you a leader. In fact, research shows that the #1 reason most people quit their job is because of a bad boss.



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Here are a few key tips to remember:

1. Bosses Intimidate and use fear as a tool. Leaders Inspire people to be the best version of themselves.
2. Bosses watch like a hawk, always looking to point out mistakes. Leaders teach and guide and help their team course-correct in order to stay on track with their goals.
3. Bosses say they “Hear you”. Leaders use Active Listening and provide feedback to give you the confidence that your message has been correctly received and interpreted by them, even if they have a different opinion.
4. Bosses give Orders. Leaders get buy-in and commitments based on what people feel comfortably challenged with delivering.
5. Bosses are Hands-Off; meaning they give a decree and then hope it gets done. Leaders are hands-on and stay with the process and with the team until everyone is comfortable that the job has been done, and they can all be proud of the output.

**When you talk to a manager, you get the feeling that they are important. When you talk to Leaders you get the feeling that YOU are important!**



# RESOURCES

## Beverley Thompson

- CEO & Award Winning Sales Trainer and Strategist, Hulaine Strategic Services
- Hulaine Strategic Services provides sales training, coaching, leadership development and sales infrastructure improvement to individuals and companies in the Caribbean region.
- Contact: [bthompson@hulaine.com](mailto:bthompson@hulaine.com) or 876-276-9905
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## Presentation Creation Tools

- Microsoft PowerPoint
- Google Slides - <https://www.google.com/slides/about/>
- Prezi – [www.prezi.com](http://www.prezi.com)
- Canva – [www.canva.com](http://www.canva.com)



# RESOURCES

## 7 Tips for Creating a Sales Presentation That Makes the Sale

- <https://www.thebalancesmb.com/how-to-create-a-powerful-sales-presentation-2948462>

## Sales Presentations: Templates, Examples & Ideas on How to Present Like a Pro

- <https://www.pipedrive.com/en/blog/sales-presentation>

## 9 Sales Presentation Tips That Great Salespeople Swear By

- <https://www.gong.io/blog/sales-presentation/>

## Prep, Present, and Follow Through: How To Nail Your Next Sales Presentation

- <https://www.salesforce.com/blog/2014/01/sales-presentation-tips-gp.html>

## 7 Tips on Delivering a Perfect and Powerful Sales Presentation

- <https://www.forcemanager.com/blog/7-tips-making-remarkable-sales-presentation/>

## How to give effective sales presentations?

- <https://www.youtube.com/watch?v=8eo01Wlkd4o&t=77s>

## How to Sell A Product - Sell Anything to Anyone with The 4 P's Method

- <https://www.youtube.com/watch?v=UCo3Z-y72Kg>



# RESOURCES

## How to speak so that people want to listen | Julian Treasure

- <https://www.youtube.com/watch?v=elho2S0Zahl>

## Selling to Executives: 10 Essential Sales Presentation Tips

- <https://www.saleshacker.com/sales-presentation-tips/>

## How to deliver an effective sales pitch, with examples

- <https://virtualspeech.com/blog/how-to-deliver-a-great-sales-pitch>

## Books

- Virtual Selling: How to Build Relationships, Differentiate, and Win Sales Remotely by Mike Schultz
- The Compelling Communicator: Mastering the Art and Science of Exceptional Presentation Design by Tim Pollard
- The 16-Word Sales Letter™: A proven method of writing multi-million-dollar copy faster than you ever thought possible by Evaldo Albuquerque
- Make It All About Them: Winning Sales Presentations by Nadine Keller
- Unleash the Power of Storytelling: Win Hearts, Change Minds, Get Results by Rob Biesenbach