

Never Sell Alone (For Salespeople Only): The Extended Chapter

The original version of this chapter appeared in Keith Ferrazzi's *Who's Got Your Back* (Broadway Books, 2009).

"Team selling has allowed me to hone those skills and develop those relationships with our clients that matter most to our success, and to help our clients in ways that we never really dreamed of more than a couple of years ago."

– Karl Jensen, financial advisor

"I've been selling in a team for 6 years now. Everything we have put our minds to, we have been able to accomplish. I'm not saying it's been an easy road, but that's the point! When we have a tough day, we pick each other up."

– Michael McDermott, mortgage broker

Back when I was the CEO of an Internet start-up I was out there on the road, endlessly selling to big marketing departments. I truly felt the weight of the company's success, even its survival, on my shoulders. Because if there's one thing that a start-up company can't do without, it's sales. Sure, a quality product is critical, but glitches can be worked out over time. Meanwhile no matter what, you need cash to keep the lights on.

I remember nights when I would roll into Detroit, rent a car and drive out to Chrysler headquarters and check into this hotel just across the street. One snowy, frigid night, the hotel was dead quiet. Room service was closed, and so was the bar. I was tired and I couldn't stop thinking about all that was riding on the sales calls I'd scheduled for the following morning. My ability to sell and sell under pressure was about to determine the number of people the company would either have to hire or to lay off.

I felt very, very alone.

So believe me when I say I know how lonely sales can be. And that's exactly why I believe that the traditional model for sales – a lone guy, bag-in-hand, pounding the pavement or dialing for dollars – is radically insufficient for today's competitive, commoditized global marketplace, and for that matter, never really worked.

See, selling isn't only tough because it can be lonely. Back in my Deloitte days, I led a project to "reengineer the sales process" for a major health care provider. As part of the job, I tagged along with a number of the sales people in their regions. They lived

out of their cars and slept in hotels even rattier than the one I stayed at across from Chrysler. I remember one time riding with a salesman named George in his Chrysler LaBaron. This guy was a total road warrior. He had a cooler in the back with water and sodas and a bag of wet wipes so he could eat lunch while he drove and stay tidy between sales calls all at the same time. He was thrilled to have someone else with him for the day. In between conversations, he had me listen to his Tony Robbins tapes (this was the first time I'd heard the work of my now-friend), and by the end of the day, I'd gained a lot of respect for my new buddy George. Sure, he wasn't the best sales person, but I respected his ability to be out there, all alone. And he really was...alone.

Later that week, after traveling with four separate "Georges" I noticed that each of the Georges had unique selling skills. *Relationship George* was one of those people you couldn't help but like; he knew how to turn clients quickly into friends and open doors. He was masterful at caring about the client's kids', even offering to set up internships. Then there was *Solutions George*, a true expert at the strategic pitch. He closed the biggest deals by wrapping value around a more robust solution that might even go beyond his own company offering. *Product George* had built his entire career selling basically one product line, but he knew that line better than anyone else in the company, inside and out. The last of the Georges, *Closer George*, was brilliant at every sales tactic you've ever read about. He could have written an instructor's manual. He had a sixth sense for understanding when to ask for the trial close, when to talk price and when to keep silent.

It was clear to me that if the Four Georges had come together to prep for any given client, they could really help one another make bigger deals, and far more quickly, too. Relationship George was not a good closer but Closer George was not particularly strategic, just like Product George – but boy, could all of them use more of Product George. (There are certainly more Georges out there in the world, but I think you get the picture.)

From the Georges and my own personal sales experience, I started to see the dual shortfalls in working as a lone salesman – one being limits in skills and bandwidth,

the other an emotional hurdle. Of course, we always had back office folks who supported us as front-line sales guys – the technical experts, for instance. But these weren't often treated as "teams" by the sales guys. We were pretty much frontier cowboys and relished it. We liked the John-Wayne-rugged-individualism archetype, and we could pull it off pretty successfully, too – the products and solutions we were selling were simple enough, and even when it was lonely, we always came together at our regional offices or the proverbial "saloon" (well, sometimes not so proverbial) to share our stories and give each other a hard time. The water cooler was a depot for informal sales training, where we coached each other, swapped advice, and felt good about it, too.

All that's changed now. Mobile workforces, home offices, "Concalls," voicemails, e-mails and text messages have replaced the regional office. The water holes are dried up, the saloons are closed and we haven't found anything to replace them with yet. While we talk about the missed get-togethers and community of the defunct regional offices, I'm not even sure we've consciously recognized the implications of the new world, but it sure does *feel* different. As Sam Williamson, a managing director at IBM who's seen the company transition from delivering a single product – mainframe computer systems – to today's reality of complex solutions that involve offshore outsourcing and the skillsets and expertise of individuals around the world, told me, "Back in the 'good ol' days,' I received a ton of mentoring and coaching, day-to-day help and sharing in the office...Today my team is all over the globe. There's no one I can come into an office to see. The water cooler aspect does not occur. Those days are over and they're not coming back."

The high-tech world that has enabled this new virtual workplace also has made solutions in the marketplace far more complex, as Sam's comment shows. Competition is stiffer, requiring the sales force to think faster, smarter, with more breakthrough insight. Despite what everybody says, there's very little differentiation among most products in the marketplace. And when you try to sell what differentiation you have, the client's eyes glaze over like they're hearing the voices of the teacher in the old *Peanuts*

cartoons (*woh-WOH-woh-woh*). In essence, the salesperson these days is being asked to be a super high-level strategist who can talk up and down the food chain, with total relationship aplomb. For some, it means becoming an entirely new animal. (I know this because FG is constantly asked to provide the training to help sales forces reinvent their very DNA for this demanding new world).

What all this means is that we are entering a new era with new rules, where the roadmap to sales success has changed—*an era where team selling isn't an option or a nice idea – it's becoming a pathway to survival.*

As one team-selling advocate whom you'll meet in a moment told me, "It was a mystery to me why my company wasn't [team selling]....The day of the solo producer is over. That ship has sailed. The only way we are moving forward is with teams."

A New Paradigm for Sales: The Connected Team

There is a solution that satisfies both the emotional and functional needs of salespeople in the modern, high-tech marketplace. It's what I'll call Connected Team Selling, when the four Georges – or Five or Six or Twelve, depending on the product – come together to provide one another with both *functional* and *emotional* support. The result? Long-term sales performance, a superior client experience, increased customer loyalty, a shorter sales cycle, and a more joyful and inspiring work life for every George.

Functional teamwork has two dimensions. In one, product or solution experts lend their expertise and knowledge to help create greater value for the customer. This can happen in front of the customer or behind the scenes, but the end state is a far richer and more robust customer offering, with the client-facing experience based on the strongest attributes of each team member.

Then there's the other functional dimension, where the mutual leverage is not the product or solution but *the sales experience* for the customer, emphasizing specific selling skills along the sales cycle that some possess better than others.

In my early days in sales I wasn't particularly good at closing, thanks to a combination of youthful insecurity and my tendency to avoid tough conversations. That changed when I began to go on sales calls with my friend and associate at Deloitte, Bo Manning, who saw my hesitancy and would jump in and smoothly nudge the conversation toward "deal or no deal." Thanks to Bo, I learned how and when I should push a little harder. Bo also had a more attuned ear to "hear" what the prospect was actually asking for. I was selling what we could do and he was forming a strategic offering in his head which would unfold toward the end of meeting – and with his coaching, I grew in that skill as well.

Beyond these functional teams are the emotionally-integrated teams. These are all about having a support network to get you through the quarter. They tell you the truth, kick you in the butt, hold you accountable, encourage you... sound familiar? Exactly, it's the stuff of a Lifeline Group and the traditional peer to peer support that this book is all about.

Now, imagine that we can combine these two types of teams together and, for the truly evolved, throw in some form of revenue-sharing: Enter the Connected Team. Connected Teams carry out their functional cooperation smoothly and efficiently because they have the backbone of emotional connection greasing every interaction. Vulnerability, candor, generosity, and accountability are all out in force. And because they share revenue, they fail and succeed together, giving accountability an extra boost and strengthening the credo that *no one here fails*.

Despite the fact, indeed because of, the loss of much of the emotional support the local and regional offices once provided salespeople, today we have an opportunity—a chance to create something new and more powerful than we've ever had before. I would argue that the Connected Team represents a new era of sales, more effective than either functional or emotional team selling alone.

Aside from relieving loneliness, emotional integration makes functional integration a lot easier. Imagine if Bo and I had not been good friends, and capable of candor and accountability. I would have never gotten the maximum benefit from his complimentary skills, and he might have kept his observations and coaching to himself, never feeling he had permission to step in and correct my shortfalls. I might have gotten resentful and tried to avoid working with him. I needed – and today’s sales people need it more than ever – the safe space created by the Four Mindsets, or I never would have learned Bo’s lessons.

One more example: my colleague JP Kelly and me, selling together for FG. There was a time when we’d actually talk over each other, struggling to be right, *in front of clients*. Since then, we’ve gone through the kind of team building you read about in the last chapter. We’ve learned to live the Four Mindsets, and have developed empathy, mutual concern, and respect. Our egos have simmered down. The result is that we’re now harmonized, working with, and not against, each other in sales calls.

Many types of functional teams already exist in the field. But sales forces today at least need to begin to create their own forms of emotional team selling – whether it’s actual Lifeline groups or a few simple steps toward connectivity – so that whether you’re physically out in the field or in an office together, we can all find our saloons again.

TEAM TYPE	EMPHASIS	Benefits
Functional	A high-value customer facing experience by leveraging the unique, knowledge, insight, skills, talents and personalities of each team member.	<ul style="list-style-type: none"> • Improved product knowledge • Increased team learning and best practice sharing on both solution creation and selling skills • Greater cross-selling and up-selling • More senior client relationships • Greater job security (you are providing a unique function and doing it better than anyone else on the team) • Heightened ability to identify customer needs • Richer client relationships

		<ul style="list-style-type: none"> • No single point of failure in customer interaction • Enhanced continuous experiential learning
Emotional	An informal mutual support system among the various members of the sales team.	<ul style="list-style-type: none"> • Greater team member engagement and higher productivity • Lower turnover of sales force • Capitalizes on team member strengths for behind the scenes coaching • Rapid development of social bonds leading to greater overall employee satisfaction levels • Minimizes fear of failure and increases ability to take healthy risk leading to greater creativity • Boost personal confidence which translates into stronger sales presence.
Connected	The ultimate team selling model combines the benefits of functional and emotional team selling models with formal commitments and team structure and a communal compensation package that allows everyone to share in each win and experience each loss—as a team.	<p>All of the above, plus:</p> <ul style="list-style-type: none"> • Greater team member engagement • Increased incomes and revenue generation • Superior communication, learning and knowledge sharing • Heightened brand awareness and customer loyalty • Future orientation and greater emphasis on selling strategies • Increased market responsiveness and adaptability • Greater transparency and ability to repair broken client relationships • Increased alignment of values • Clearer goal setting • Increased acceptance of common vision • Greater willingness to experiment and try new things • Elimination of silos

From Connected Team to Connected Company

Connected sales teams represent the pinnacle of effective selling – and yet, there’s one level even beyond: The Connected COMPANY. The truly connected sales

force evolves beyond the sales staff and technical support to include everyone else: marketing, R&D, customer service, and so on.

Sales is the real lifeblood of companies, pumping the oxygen through the veins of commerce. Everyone else supports sales. Full stop. The more we bring down the traditional silos between marketing and sales, front office and back, the better we're able to serve customers. Working together across divisions allows us to more deeply *understand* the initiatives we might have otherwise ignored.

There's one group in particular that sales needs to connect with to be successful: Clients! Why not include influencers, referral partners and even customers in your internal sales planning? Lots of companies talk about doing this, but very few actually take the plunge. Or why not include customers in a Lifeline Group, as you might recall I did with Beth Comstock?

I've always maintained that only 50 percent of what a customer's buying is what's in the marketing materials. Connected selling is all about creative collaboration to realize that other 50 percent. And you're going to have to break down every single wall to do it.

A Roadmap to Getting More "Team" in Team Selling

Don't think the fully Connected Team is possible? We went out looking for examples and found hundreds of salesmen, quietly working together in just this manner. These were people like my cousin Wendy and other partners who had joined together to create something bigger than either could make for themselves – whether the others in their organizations were following suit or not. At the same time, I was scratching my head, wondering why, given the stellar results we were hearing about, we weren't hearing more about team selling at the institutional level.

And then, one sunny day in Florida, I met the teams at Thrivent Financial.

Thrivent Financial for Lutherans offers comprehensive financial planning for individuals. But as one its consultants and team selling evangelists, Jason Owens, puts it,

“Ideally, our product is peace of mind.” They deliver it via investment advice, fee-based plans, estate planning, mutual funds, annuities, and various forms of life insurance.

My relationship with Thrivent began when I met Nikki Sorum, one of its senior vice presidents who was in the audience at the same Harvard Business School 25th year reunion where I encountered Jamie Dimon. A few months later Nikki invited me to speak at a Thrivent Financial sales meeting in Florida. As always, I sat in the back of the room listening carefully to better understand what this company was, and how I could further customize my message for them. I loved what I was hearing. First of all, as a faith-based membership organization, Thrivent had no problem talking about generosity and vulnerability. In fact, their mission – to improve the quality of life of their members, their families, and their communities by providing solutions that focus on financial security, wellness and caring for others – was values-driven at its very core.

But beyond that, I heard something that day at Thrivent that got me particularly excited: they were talking about *team selling*. When I shared my excitement with Nikki, she immediately put me in touch with Mark Dean, Thrivent’s Director of Practice Strategies and Development, the man who had relentlessly campaigned for the power of team practices inside Thrivent, and is now leading the charge along with Roger Arnold, a vice president, and others, to re-wire the DNA of the company in favor of teams.

Mark’s job was for him a mission—a vision of team selling that focused all the organization’s resources on creating greater value for the customer and greater satisfaction and personal success for his co-workers. Through his efforts, Thrivent created a three-tiered sales support structure that allowed solo salespeople to keep working that way if they wished, allowed others to become part of an *association* (groups of sales people and support staff that worked together to provide loose functional and ideally, emotional support) or to participate in fully integrated and connected sales teams the company called *ensembles* (which were designed to harness the energy and commitment of the entire practice through functional, emotional and financial interconnection). In an ensemble, one person’s success is the team’s success;

one person's failure is the team's failure. Ensembles share everything – including the revenue! They are truly the epitome of the Connected Team.

Just eighteen months into the new program, Thrivent had about four hundred offices participating, seventy-five of which operate as ensembles. Here are some of their initial results:

- New salespeople who work as part of a team are 20 percent more productive than those who sell alone.
- Retention rates among members of sales teams were 23 percent greater than among individual salespeople.
- Net new business for sales teams was 37 percent more than for traditional sales teams and solo practices.

The benefits for the company seem obvious, but the benefits for Thrivent's customers are even more pronounced. Customer satisfaction levels of clients served by selling teams are fully 53 percent greater than among clients served by solo salespeople. . "Clients want someone who is knowledgeable on each aspect of what we do to provide the appropriate level of advice, be it life insurance, long-term care insurance, or investments," says Mark. They also want someone who understands their situation...and matches their personal style. Our world is becoming so complex that all of these needs can't be solved by just one person any more – and maybe never could have been."

Clients report that they prefer the team model hands-down: "I was so worried about my retirement. I know I couldn't have trusted that just one person would know everything he needed to know to give me good advice. Instead we were dealing with more than one person, and we could actually understand what they were saying," Diane, a Thrivent client, told us.

Today, Mark and Roger modestly credit others for creating the Thrivent team-selling concept. "It was really the folks in the field (sales force) that led the change. They were the one's coming to us with the ideas. We just followed their lead and started formalizing things in meeting our Financial Associates needs to improve.""

How Does Thrivent Do It?

Connected team selling isn't a decision, it's a destination – a process with no short cuts. If a field office is to go all the way, it demands full commitment from every member of the team. Since not everybody's ready for it, Thrivent offers three levels of support to help offices transition to teaming, each designed to help develop the foundations needed for a Connected Team. As you'll see, the company's support levels parallel our model of the three stages of team selling: Emotional, Functional, and the Connected Team. Each stage prepares a team for the next as you move toward total connection.

The Emotional Team: Building from the Ground Up

Team selling takes team effort; everyone has to be on board. When a request comes from just one or two members of a field sales office at Thrivent, requesting support for transforming the office into a formal team-selling model -- usually people who have tasted informal teaming already – Mark knows the office isn't yet ready to make the shift. The company provides materials that help develop the foundations of team-selling by answering questions like, “Where do I start? What do I do first?” They are pushed to address questions like, “Why it is better to work with others? How do I identify what's important to other people on my team?”

Thrivent also asks potential connected teams to develop a shared mission and vision statement, and to complete a Complimentary Skills Assessment—a straightforward process whereby group members identify their individual functional strengths and weaknesses. What results is an inventory of strengths representing the very best that the team has to offer. The inventory is then compared with the competencies necessary to run a field office, and ensure the team has all the skills necessary to “knock it out of the park” at every point in the sales cycle. Would-be

connected teams can quickly get a feel for the gaps they'll need to fill before becoming a formally connected selling team.

HOW CAN I DO THIS?

If you're either a lone salesman who'd like to start working with a few sales buddies, or a manager who's considering a shift to team selling, kicking off a Lifeline Group is the place to start. It'll help build the respect and intimacy that's so integral to smooth functioning. How formal you want to be is up to you, but the important thing is that you solidly ground your relationships in the Four Mindsets. At this stage, you'll create a more specific group goal focused on increased sales (see the Greenlight Group chapter in *Who's Got Your Back*), but your focus will still be on your own personal and professional development. As the group matures, you can begin to explore creating more shared goals and collaborations on actual sales or account planning or sales calls, and ultimately working toward functional integration.

Even at the Emotional stage, it makes sense to choose your partners strategically. Just as when you form any Lifeline Group, you're looking for people whose strengths and weaknesses compliment your own. To help figure it out, take a personal inventory – you'll need one to help you figure out who to look for as teammates.

Take a piece of paper and create two columns. On the left side of the paper write down every discrete element of your job, making calls, setting-up meetings, writing proposals, closing deals, keeping in touch, product expertise, etc. (Just coming up with the list is a great exercise to do with your fellow sales reps and can shed a lot of insight.) On the right side, jot down High Medium or Low to indicate your level of skill, competency and desire relating to performing each task. This list will show you the things you are best at and the things you like doing. Remember the whole idea is to leverage what you are best at (typically it's what you enjoy the doing the most), and this list will serve as your guide.

Now take a look at those items that you ranked lowest on your list. These are the elements of your job for which you need the most help and support. When you glance at the list of items that you don't do well, ask yourself, "Who does that list describe?" More often than not, the person or persons that could fit the bill will be easy to identify.

SIDEBAR: Tips for Virtual Teams

1. Try to kick off your team with an in-person meeting if at all possible – then it becomes much easier to shift to the phones.
2. Start with a small team – 3 to 4 people. It's easy for someone to "disappear" on a conference call, or for the call to turn into a fight for airtime. Having a small group helps manage both problems.
3. Team members should leverage the opinions and recommendations of common third-party contacts. That helps establish a fuller sense of each other as individuals, and also builds trust.
4. Don't be impatient with long calls. Virtual teams require even more meeting time than physical teams because the communication channel is simply not as robust as in-person meetings. Give the calls a chance. If you are on email or doing other things it won't work. Be somewhere away from your desk and papers and devices.
5. Don't allow the limitations of virtual interaction to stand in your way of getting to know the other members of your team. Make sure to emphasize the sharing of personal and familial experiences in your team discussions. Great teams can even take the bold step of having some virtual fun or gaming opportunity where team members "play" and interact on something totally outside of the business – if you're not tech-savvy, enlist your kids' help!
6. Be creative: If conference calls aren't working or feel insufficient, try chat rooms and other online group forums that allow people's posts to appear next to their pictures. Some companies, such as the enterprise software

giant Oracle, are experimenting with conducting company meetings inside online environments like Second Life as a way to improve interaction and intimacy.

Level 2: Functional Teaming

Mark also receives requests from field offices that have informally tested team selling and have a taste for the success they've experienced. Generally these functional teams have meetings together, but they take place irregularly. They cooperate on some level, on some accounts, but don't have any formal system in place for workflow, role assignment, or group accountability.

HOW CAN I DO IT?

At this point, you should already have strong relationships going thanks to your original Lifeline Group. As you move into functional integration, you may move forward with the same team, or you might want to get even more strategic about who the members will be. Remember the Four Georges: Ensure the skills represented on the team cover every requirement of your sales cycle. As Jeremy Hofer, a Thrivent advisor in Thousand Oaks, California, put it, "Each member of the team knows he or she is very, very good at certain things and there are other things other people should take on, because they can simply do it just as well, or better."

At this stage, all the same rules for Lifeline Groups apply. Together, decide how much responsibility you'll share, and rewrite your Promises, Guidelines, and Rules as necessary to reflect your new functional integration. Clearly define your roles, and each week, shift your goal setting and accountability processes from individual goals to shared goals.

Remember, just as with Lifeline Groups, there's no boss of a true team. Leadership is shared, with each member taking the lead by contributing the skills

and knowledge that best support the team's efforts. One real benefit of functional team selling – and even more so, connected team selling – is that it can help fill the void of great middle-level management that so many salesmen complain about. Each member pushes the others to peak performance, and the team holds itself accountable. The group doesn't eliminate the need for a sales manager, and smart managers should encourage strong teams by offering coaching and advice, rather than dictums and directives. If the team isn't allowed to work out solutions through its own problem-solving mechanisms, it'll never have the opportunity to learn and develop. Instead, the team will only ever be as good as the guy telling them what to do, their manager.

It's up to you to leverage the success of your informal selling team to encourage your sales manager to establish a formal team selling model in the organization. If and when the company wants to go "whole hog" in the creation of a formal connected team selling model, it's likely that your informal team will act as a guide. As the person that took the individual initiative to begin selling as a team, you'll be regarded a leader and expert in rolling out the initiative for the entire company, should that day someday come. Played correctly, this could be a great opportunity for you to get noticed, and to advance your career.

Level 3: Moving to a Connected Selling Team Model

At Thrivent, more mature teams desiring to move to a whole other level of performance are the best candidates for achieving success as connected teams. This move is significant and requires that the team be united in its desire, intentional in its approach, hands-on, and committed to making it work. Mark can tell the team is ready to switch to a formal model when:

- Members know one another well; and there is a rhythm in how they work.

- Members have already developed a high-level of trust in one another, a characteristic easily identified in how they communicate. A no-holds-barred exchange that may feel uncomfortable to an outside observer but doesn't seem to faze the team is an excellent indicator that they're ready to move toward connected selling.
- The group has an established history of regular meetings to discuss sales strategy and tactical planning. If a group hasn't started to share the business of managing the business, it is unlikely they'll succeed as connected teams.
- Teams already have a clear understanding of each member's role, and a respect for how it contributes to the overall process.

As with any team effort, these groups need to put real thought and consideration into their union – as I’ve said before, it’s akin to taking your wedding vows. At Thrivent ,those “vows” include clearly defined and consistently articulated mission and vision statements; well developed and mutually agreed upon processes and procedures; established workflows and team charter; and specific metrics to measure the team’s success. And because the financial stakes are so high, Thrivent includes an additional step that goes beyond anything we’ve described in this book so far: Crafting a pre-nup. Yep, a pre-nup! We recommend this for any Connected Team. Like any marriage, there may be commitments that simply don’t work, so teams need a clear exit strategy in the event that the group dissolves – and in this case, we’re talking formal contracts and peoples livelihoods, so a little more rigor may be needed.

How Can I Do It?

As a functionally integrated team, you’re already involved in a lot of informal cooperation at this point – pitching in on proposals, tag-teaming on a sales call, sharing leads, and so forth. But over time, you might feel ready to take your team commitment all the way. That takes three shared commitments:

- 1. The entire group you work with is part of the team.**
- 2. Together you clearly define process and workflows, and stick with them through disciplined accountability.**
- 3. Everyone shares in the revenue.**

This is a big step, and you’ll first need to go through all the stages of emotional and functional integration we’ve already discussed. And of course, if you’re working for a company, becoming a fully connected team (to the point of sharing compensation) will require institutional support.

Money can create a special pitfall for even the best selling teams. Remember, human nature won't change simply because you've started selling as a team. Until the team begins to reap the rewards of selling as a group, you'll likely face the issue of "what's mine is mine" until you prove that "what's ours is bigger or better." The key is being willing to trust, share and invest, instead of slicing every penny – a mindset of abundance, not scarcity. The team can call for a reconciliation if someone feels like things aren't working out fairly, because connected teams problem solve for themselves, but the focus should be on the long term.

Before committing to connected selling, each member should estimate what they might earn or produce alone, as the base case. Then the team as a whole should produce an estimate of what they can achieve together. Keep extending the team projection until you have reached a point that makes everyone more successful, or until the advantages of working as a team outweigh the loss a single member might experience.

Don't get me wrong. I'm not suggesting that every member in every Connected Team takes an equal piece of the pie – not all roles create the same level of value in the sales process. But if you are asking yourself, Can I build a totally connected selling team without at least some sharing of the revenues, the answer is a resounding *no!*

Why? To gain the total commitment necessary to run a true Connected Team everyone has to have skin in the game. The only skin that really counts in business is cash! When a salesperson walks through the door waving a contract, everyone should feel the win – in their pocket book. In turn, when that same salesperson walks through the door and delivers the bad news that the team's lost a deal – everyone needs to feel the pain.

What's the Split?

You may ask if there is a specific way or proportional formula to guide you in the development of revenue splits and the answer is no. There are simply too many variables: industry, price of product, deal size, number of deals, sales cycle time, proportional contributions of the various team's members, and on and on. But here's your guide. Whatever the split, ensure that it is:

1. Fair: The split truly reflects the value provided by each team role – it may not always hold true that the account owner gets the deserves the biggest share
2. Impactful: However you slice and dice the revenue, you must ensure that the impact of the compensation is significant and substantive in relation to each team member’s total compensation. For example, a top sales person with a \$200K base salary is not going to be moved by a \$300 bonus—yet, \$300 to an administrative person working for \$30K a year would likely place a much higher value on such a bonus.
3. Prompt: Don’t make the mistake of getting everything right with the split, and then delaying payment so loses its meaning. When there is a win you want that to be embraced and celebrated. Annual bonus pools dull the impact of each win by delaying reward to a date far in the future. Cutting someone ten \$300 checks as close to the deals’ close as you can will support the behavior you seek far more than one \$3K check at the end of the year.

Consider the experience of Karl Jensen, as he describes how connected selling teams transcend momentary financial concerns for the benefit of the team. “There were times when I wasn’t meeting the bills and the team would basically pony up and hand me a couple thousand dollars to get me through. But it always came back to each other by giving that kind of behavior to one.”

Financial stress breaks up plenty of marriages. The ones that survive money trouble are generally the ones who are most transparent, open, and aligned around spending and financial goals – and everything else in their marriage. The same goes for a selling team: talking and writing about your shared goals and values upfront, building trust, and matching each other’s commitment to the partnership are the best ways to prepare yourselves to handle money. If you do go the distance, the rewards for your business and the strength of your team can be substantial.

Jim Elvestrom, a Thrivent ensemble sales member, talked about his initial hesitancy to share clients. “One of the big challenges on my end was giving up control of my client base to other members of the team,” he said. “But once I did, you could see the light turn on and we almost instantly developed far more cohesion and structure as a team....knowing that we are not necessarily worried about who’s getting credit for what sale and can focus on making sure that we are – and we use the word a lot – client-centric versus product-centric.”

Jeremy House and Michael McDermott, two connected-selling mortgage brokers from Phoenix, told me that meaningful accountability depends on having open and candid team communications: “We are each accountable for our own and for each other’s success. When one partner has a pattern of bringing in fewer loans (and revenue), instead of punishing one of us with a smaller cut of the pay we have held meetings to analyze and discuss where the gap is and address it. I mean we get down to the psychology of the whole thing to see where the problem lies. This way we are supporting growth and self improvement rather than punishing and discouraging one another.”

In a connected team-selling model, robust communication becomes even more important. Get over the idea that time holding meetings, is time out of the field. Time that could be used selling. Harvard professor and leadership guru John P. Kotter once advised leaders to estimate the amount of communication they’d need to be effective—then increase that number by a factor of ten. The same is true for the communications needs of connected sales teams.

With sales teams, there’s no room for flexibility around weekly meetings; they must be a priority – no ifs, ands, or buts. You’ll need daily check-ins, too. Yes, it takes commitment, and shifting from lone wolf to being a fully accountable teammate may not be for everyone. But if you really want to up your game and that of those around you, you need to COMMIT to this kind of effort. You need every day joint brainstorming around the question, “How do we do it even better?”

Or as Michael McDermott from Phoenix put it, “You need to come up with one or two things you can each do each day to continue to take steps in the right direction—forward.” Michael and Jeremy told us that it took experience for them to realize how important that daily brainstorming was. In the early days of their team, they would get up and leave at 5 a.m. to spend two hours driving to an area where the market was easier. When they later were established enough to succeed in their own area, they dropped the driving. Sounds like it should have improved their business, right – four extra hours free for selling? Instead, their sales started slacking off, and their days felt

out of whack. What had changed? After digging into it, they realized it was the commute! Without it, they lost the morning injection of creativity, time, accountability checks, and planning, and the evening deconstruction of the day that had passed. So in order to rebuild those meetings, they scheduled morning gym time together, followed by a morning brainstorming meeting. In a couple of months, sales were back up and they were both much happier and more balanced in their lives and work.

Here's the point: The rules of strategic, relationship-centric team selling are not the same as the numbers game of transactional selling. If you move into formal integration, the team will have to invest a great deal of time and energy figuring out what each person's role will be and how those roles complement one another. In the early stages of connected team development it will take lots of time to get everyone to understand the needs of each client. Even after the team is up to speed it will take far longer to ensure that client information flows freely and that communications channels remain robust.

You'll want to encourage ongoing feedback on what's working and not working as well – for example, after a team sales call. *Everything you do together is an opportunity for candid feedback and improvement.* Use the same principles around feedback that we discussed in Sparring and in the Lifeline Groups model. When you're casually quarterbacking calls, don't grind axes or try to find resolution; your goal is to get everyone talking openly about what worked and didn't.

Once you get into money, accountability becomes more important than ever. Creating accountability takes forethought and a willingness to experiment. At weekly meetings, goals – both performance and learning, as we talked about in the Goals chapter – need to be committed to and followed through on. Metrics might be sales numbers, but also important events, like getting an important meeting booked, closing a deal, or getting a referral, etc.

Tracking the numbers is easy; tracking learning goals and behavioral change is harder and may involve some creativity to create accountability around continuous innovation. You might come up with an exercise like this: Each member comes to weekly

meetings with a win to celebrate and an issue to avoid in the future. The win should involve someone on the team that they can congratulate and thank. Then as a team, they pick the wins apart and find the core thing that was behind those successes. They record it, and assign a couple of team members to try to put it into practice in the upcoming week or two. Once the time period is up, the group reviews the “test” together and discuss whether it’s worth everybody implementing all the time. On the “issue” side, the group discusses how to create a process to avoid it happening in the future.

What are the common pitfalls of CONNECTED team selling?

Connected team selling is incredibly effective, but it’s not a panacea. We have found the following items to be among the most often reported obstacles to team selling success:

1. **Organizational Commitment.** Constructing a team selling system, rolling it out to the field and providing the training and support necessary to bring teams to life, takes time. Organizations that enter the world of team selling halfheartedly will find no shortage of reasons to stop the effort along the way. In the initial stages, individuals will take any sign of weakness in organizational commitment as an excuse to hold on to the past and protect themselves against the potentiality of returning to a solo-selling model. Don’t let this happen! Communicate your commitment to the model often and without reservation. Anything short of this level of commitment could affect the performance of your selling teams.
2. **Individual Commitment.** It’s not uncommon for top producers to see the team selling model as a threat to their own status and power within the organization. Top performers may also see an initial dip in their individual compensation levels. It is critical that these individuals understand that any shortfalls are only

temporary while the team-selling model spins up to full capacity and produces more than enough business to help them surpass prior earning levels.

As Karl Jensen, a Thrivent ensemble member, told me, “At the moment, the top performers take the brunt of the risk of not having commissions coming in. And one of the reasons we do that is because we’re building our practice to have so much ongoing fee both from our advisor accounts and our fee based planning. It takes a long time to build that up to a sustainable level. We’re doing a great job. But in the meantime, I’m not focusing as much as I used to on making the sale, making that commission. So these guys are supporting me by guaranteeing me, out of their own pockets, sometimes, a base salary.”

- 3. Insufficiently developed relationships.** Deep intimacy, trust, and respect is essential to the Connected Team. That’s why we recommend starting the process with Emotional integration, through Lifeline Groups. Without strong relationships, egos get in the way of challenge and growth. As Michael McDermott, who’s been partnered with Jeremy House for six years running, told us, “We have seen others attempt a ‘team’ concept with their business and every time it seems that ego is the demise of their progress. To have a thriving team, there must be communication without hesitation. If you allow your ego to get in the way of sharing an idea or accepting others’ ideas, a team will fail.” A member of Karl Jenson’s team put it another way, “I wouldn’t say any of us are without egos, but we put them in our back pocket because the most important thing here is the bottom line.”

The Reward of the Connected Team

You may think full integration – whether with a couple of buddies on your own, or at an institutional level in your company – sounds tough. Well, recently I met a sales team that was posting off-the-charts performance month after month, quarter over

quarter. Their organization had instituted a team selling process, and several of the team members admitted that they'd been skeptical at first. Issues related to compensation, trust, distribution of work, yep, all the issues you might expect.

Then something happened – somewhere along the line the team jelled. People started to support one another and anticipate each other's needs – and superior sales performance wasn't far behind. I listened to their stories and then asked a question: "What would you do if your organization decided to scrap the team selling model tomorrow?"

One team member didn't miss a beat with his answer. "I guess we'd have to find a something else to do."

I wasn't really sure I understood what he was saying. "So, you'd stop working for the company?"

"Whatever s necessary, *we'd* either find a way to keep working together as a team here or *we'd* take the *team* elsewhere. There isn't much *we* couldn't do together and *we're* not going to lose this now."

As far as I was concerned, that said it all.

A Day in the Life of a Connected Team Member

Day in the Life of a Connected Team

7:30-7:45 AM: *Rapid-fire Briefing*

This connected team starts each day with a meeting to discuss priorities and deadlines for THAT DAY. Several members sit around the conference room table, while remote workers listen in on a conference line. The team rotates the responsibility of running the call.

8:00 – 9:00 AM: Client Meetings Prep

Client Case Reviews

Client case reviews are conducted on a rolling basis. Some will be reviewed for the first time and others are reviewed based on reaching established milestones. Each milestone review will determine which member of members of the team will be held accountable for driving the deal to the next check-in point. The team also reviews the schedule of sale calls and makes assignments to ensure each sales call is confirmed or rescheduled accordingly.

Sale Call Schedules

Team reviews the case histories of each client with a scheduled in-office and field sales call. Like Peter Phelps in the old *Mission Impossible* TV show, the team considers the unique skills and talents of each team member to determine which member will participate in each meeting and what specific roles or client connection points they will emphasize.

Close & Exit Strategies

Client case reviews ensure that the team has two clear, agreed-upon strategies for each client. First, the team creates a roadmap to close; discussing the likely timeframe to close the account, pre-planning cross-selling and up-selling opportunities and defining the tactical strategy to get to the close (milestone check-in points in the sales cycle). Just as important the team agrees to an exit strategy. Every deal is doesn't make good business sense or justify unlimited time or resource investment. Prior to the first meeting, the team agrees to certain milestones or indicators that will 'red flag' the deal as not being worthy of further investment.

Social Arbitrage

Finally, the team reviews each client case file to determine what ways the CTS can help the client achieve their personal or professional goals. During this part of the client case review each team member works to connect their network of contacts to help clients achieve success. Examples of client assistance might include making an important business introduction, helping a client meet a college recruiter to help one of the client's children gain acceptance to a desired university or simply inviting the client to a social event, etc.

Quarterbacking

The team reviews the outcomes of closed opportunities. Wins are reviewed to determine best practices and lessons learned that will help other team members be more effective on future sales efforts. Similarly, the team will candidly review and evaluate lost opportunities to determine how to better address such opportunities in the future.

10:00-10:15 A team member has a kid with a dental emergency and has to miss a client meeting. The team has a brief pow-wow: Yes, they can run the meeting without her.

11:30 AM: In-Office Client Meeting

Meeting continues with the missing team member – no problem because everybody knows the account backward and forward, and has good relations with the client.

Lunchtime

Members of the team meet at a local watering hole. One team member asks another for some advice on some problems at home, while others

chat about an upcoming dinner party they're hosting to thank their clients and meet some new ones.

1:30-4:30 PM

Field sales calls

Various team members come together to make sales calls, with teams based on the customer's solution needs, and the sales skills of the team. Some team members are called in virtually.

5:00-5:30 PM: Weekly Personal & Professional Check-in

This end-of-day session is designed to ensure that team members keep abreast of each other's needs – both on a personal and professional level. If there's trouble brewing in a team member's personal life, it is important for the team to understand the issue for two reasons. First, the team should be genuinely concerned about the welfare of each member and second, issues that affect one team member hold the potential of disrupting the entire team operation.

The original version of this chapter appeared in Keith Ferrazzi's *Who's Got Your Back* (Broadway Books, 2009).