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THE VIRTUAL SALES HANDBOOK

A hands-on approach to
engaging customers

WILEY

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The Virtual Sales Handbook

**A Hands-on Approach to Engaging
Customers**

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WILEY

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To the reader, who wants to start navigating the virtual sales world.

Preface

The Virtual Sales Handbook is a hands-on guide for sales professionals introducing the basics of effective virtual customer engagement. It explores the opportunity space of embracing the virtual medium, as well as the barriers associated with virtual meetings and how to effectively overcome them.

This book provides hands-on tips and tricks on how to effectively prepare, run, and follow up on virtual meetings, and inspiration on leading the transformation from physical to virtual sales in a hybrid sales model.

During the past 15 years, we have had the privilege of working with commercial organisations all over the world and met thousands of dedicated sales people, who, on a daily basis, aim to help and inspire their customers and inspire their current and prospective customers.

We want to dedicate this book to all of you, and we hope the recommendations, tips, and tricks introduced can help you all increase your reach and impact.

We also hope that by applying more virtual interactions, you are all able to create better results whilst freeing up more time to spend with your friends and relatives. We hope you will see Virtual Customer Engagement as a true win-win concept, benefitting both your customers, yourself, the planet, and your friends and family.

Introduction

I cannot wait to get back to physical meetings again.

How often have you thought that in recent months? If you have, then you are certainly not alone! One question we often hear is: “Are virtual sales meetings as good as sales meetings conducted in person?”

There are certain things that cannot be fully replaced by technology. Most salespeople prefer face-to-face contact with customers and prospects for many good reasons. Behavioural science argues that the best way to gain someone's trust is by being together physically. The reason is that trust between people is built as a result of nonverbal cues like facial expressions, body language, the positioning of someone's hands, and so on.

There is a reason why sales is often regarded as an art as much as a science —and many salespeople rely on their interpersonal relationships and their personal charisma as much as they rely on their hard sales skills. Interacting with physical distance, for example, via a phone or virtual interface like Zoom, Teams, Skype or others, limits most of these nonverbal cues and can make it more difficult to leverage our “soft skills.”

However, the recent global pandemic has forced us to acknowledge that we need to find a way to adapt to a primarily virtual environment for customer and prospect interactions. With social distancing likely to be something we must accept for months or even years to come, we need to ask a fundamentally different question: **How can you make virtual sales meetings as good as face-to-face sales meetings?**

That is what this handbook is designed to help you achieve —making your virtual customer and sales meetings as good as, or even better than, face-to-face meetings. Over the coming chapters, we share advice, tips, and tricks to allow you to master virtual selling and virtual customer interactions to the same extent that you master face-to-face interactions. If you follow our recommendations, we are sure you will conclude that virtual sales and customer meetings can be as successful as face-to-face meetings. What is more, we are also confident that you will realise you can produce the same or better results all while freeing up more time for your family, friends, and hobbies.

Virtual selling is a win-win concept. You will benefit, your customers will benefit, and even the planet will benefit.

But I already had virtual meetings before Covid-19—what is new?

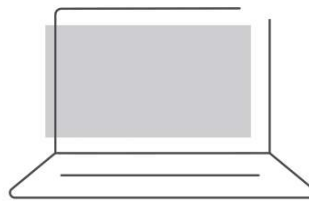
If you follow some of the global research on the adoption of virtual selling, you will already know that more than 50% of salespeople already held virtual meetings before the pandemic.¹ So, what has changed? What is new?

We believe there are three major paradigm shifts taking place:

1. **Virtual is often the only option:** Before Covid-19, it was you who decided which meetings were fit for virtual and which were not. During the period of social distancing and/or lockdown, most of us were forced to conduct all our meetings virtually. This included the ones that we would usually have held as face-to-face meetings. Now we no longer have the power to make that decision.

Some meetings will be with people in countries you cannot travel to either due to local travel bans or because of the risk that you have to self-quarantine on your return home. And even when national or regional border restrictions are lifted, many sales organisations believe that their customers will remain reluctant to welcome external partners on site in the long run—making effective virtual customer engagement a precondition to effectively serve your customer base. In our recent study of over 300 global commercial employees, 80% admitted that they would continue to use virtual as a means to connect with customers and prospects in the future.

80%

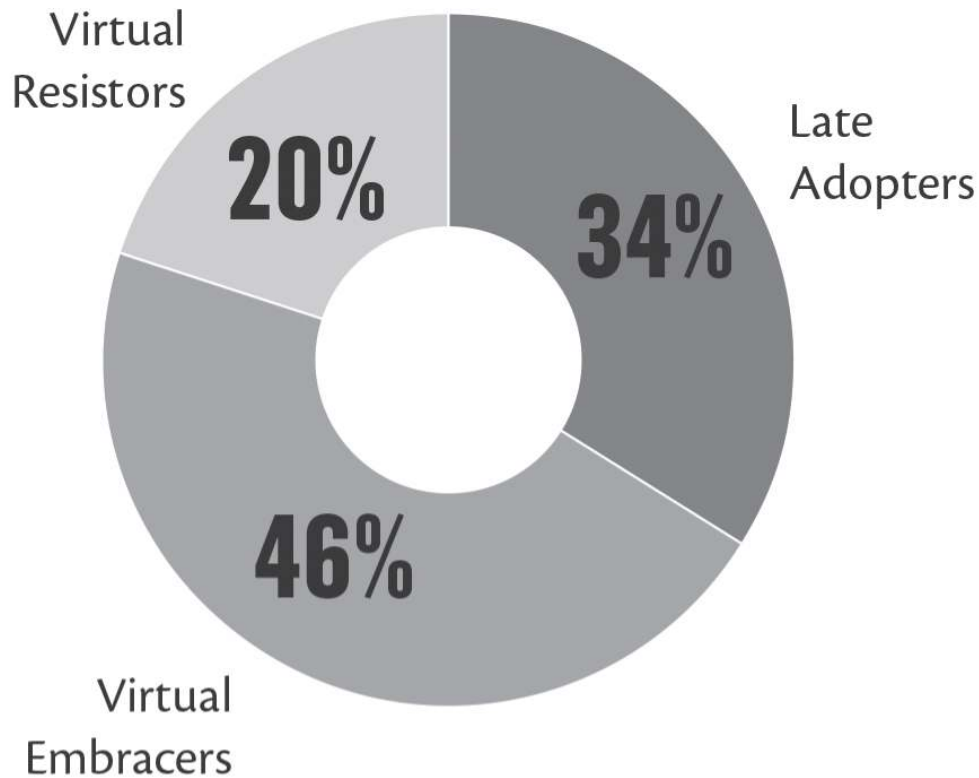


of commercial employees admitted they would continue to use virtual sales in the future

- 2. Technology and technology adoption are picking up:** Think back to the early days of the pandemic. Most people did not turn on their camera in virtual meetings, and you were probably amazed when someone seamlessly navigated between PowerPoint, chat, and breakout rooms (in Zoom). Two things have happened since early March 2020. Most people have gotten used to the technology and can now use several basic functions to make virtual meetings work better, including turning on the camera and uploading a PowerPoint presentation. At the same time, the virtual platforms have improved. There is no doubt that Microsoft Teams was behind Zoom in March 2020, but

with the recent releases, technology is certainly becoming more supportive in making virtual interactions work even better.

The adoption of new technology and new ways of working follow a predictable path. First, you see innovators trying new technologies and ways of working simply because they are new and different. The early adopters follow the innovators and are then followed by the early majority. The late majority join next and finally the laggards come on board. In our recent virtual sales study, we found that 80% of respondents can be classified as virtual embracers or late adopters: commercial employees characterised by their willingness to pursue more virtual customer meetings in the future. Only 20% were classified as virtual resisters—those who expect to go fully back to a physical “normal” face-to-face model once the pandemic has ceased.



- 46% Virtual Embracers
Respondents who will pursue the virtual engagement model in the future.
- 34% Late Adopters
Respondents who will pursue the virtual engagement model in the future.
- 20% Virtual Resistors
Respondents who will not pursue the virtual engagement model in the future.

3. **More people better adjust their approach to fit virtual delivery:** Pre-Covid-19, studies showed that more than 50% of salespeople believed they adjusted their behaviour and how they interacted online to fit virtual interaction. However, when observed, experts

revealed that just 12% adjusted properly² and used the necessary tools to make the most of a virtual interaction. That means, unless you were among the 12%, there was plenty of opportunity to improve the quality and outcome of virtual meetings.

Following eight intense months (March 2020 to October 2020) of applying virtual tools, being in virtual meetings both internally and externally, and attending various virtual training and knowledge-sharing sessions, we believe this number has changed. We see a higher proportion of salespeople adapting more of the tools and practices driving effective customer meetings. As a result, quite a large proportion of respondents in our survey now find that virtual meetings are as effective or even slightly better than the face-to-face meetings they held previously. Of close to 300 respondents, 48% replied that virtual meetings are as good or better than previous meetings and that they are likely to continue working virtually and increasing their number of meetings altogether going forward.

Are you saying that the future of sales is fully virtual?

No! Absolutely not. We recently interviewed Mark Bowden, an expert in human psychology and body language, and asked him the question: Can we expect a future of 100% virtual sales meetings?

This was his answer: *“In any sales situation, the person who gets in front of the customer will win the deal.”*

He shared plenty of examples of why it is still so important to have that face-to-face contact, many of which related to the importance of non-verbal communication and creating

trust between people. We also do not believe in a fully virtual sales model for most companies. The human factor is simply too important to be fully replaced with a screen. What we do believe, however, is in the future of a hybrid model. The hybrid model leverages each mode of customer interaction—both physical and virtual—for its strengths: to secure the most impactful, effective, and engaging customer experience possible. It is a future where we innovate our virtual and physical meetings to deliver high value to our customers and prospects.

The opportunities are endless. As we move through the book, we will touch on these potential ways of using the virtual world to innovate and create new ways of meeting and creating value for customers and prospects.

How comfortable are you in virtual sales meetings?

Our research found that virtual meeting success is strongly correlated with salespeople's virtual comfort level: those with the highest comfort levels (8.0/10) report better virtual meeting outcomes than even face-to-face, while those with the lowest average comfort level (6.3/10) report experiencing worse outcomes when interacting virtually.

We will explore this idea of comfort later in the book, but the reason we are telling you this is because how you rate your comfort level appears to be key to the level of success you have in virtual meetings. If you are not comfortable with hosting meetings in a virtual environment, then it is not realistic to expect them to go well.

The good news is that your comfort level can be improved through training and rehearsals. So, if you find yourself in the category of seeing worse outcomes from virtual meetings, you may take comfort in the fact that further

training and more frequent “just trying it out” will eventually lead you to also see the full benefits, just as 80% (early adopters and late adopters) of your colleagues already do, according to our research.

One of our main motivations in writing this book is to help you improve your comfort level in the virtual environment. If we can get everyone who reads this book to a comfort level of eight or above, we will feel that we have done a good job.

On the scale below, write down where you see yourself on a scale of 1 to 10 based on how comfortable you feel hosting a virtual meeting.



How comfortable are you in hosting a virtual meeting?
Please note your comfort level on the scale below

1

I am not comfortable hosting virtual meetings



10

I am very comfortable – I run great and engaging virtual meetings



Tap into our expertise

As well as extensive experience in sales, we have a great deal of knowledge to share about introducing and facilitating virtual sales meetings.

Christian Milner Nymand and Mante Kvedare are both Partners at Implement Consulting Group, where they have been driving the business' virtual sales initiatives, contributing to thought leadership on the topic of virtual selling, and leading training programs for global commercial managers.

Christian joined Implement in 2003 after working as a management consultant at a Danish consulting company. In his role as senior partner, he helps global B2B companies improve their commercial capabilities and accelerate their top-line growth. He is highly competent at operationalising commercial, sales, and marketing excellence methods and tools to create business impact. He has led several global sales transformation projects as a result of his extensive knowledge and experience.

Mante has more than 10 years of experience in supporting international organisations in commercial transformations. Prior to joining Implement, she managed a business unit for a key Nordic FMCG player. Her primary focus is on developing the commercial agenda of B2C and B2B companies, where she successfully delivers change initiatives as a trusted advisor to the C-suite. Her experience of working with organisations across Europe, the Middle East, and Asia gives her a strong cross-cultural understanding and a global viewpoint.

Our aim with this book is to help you feel more comfortable operating in a virtual sales environment, as well as to introduce you to the various opportunities that virtual selling offers. We will explore the key barriers to good virtual meetings, providing you with actionable tips and

tricks to help you overcome some of the most common issues we have identified.

We have designed this book to be highly practical, providing you with useful tools and tips that you can introduce to your meetings immediately. As we move through the chapters, we will explore how to prepare for and deliver a successful virtual sales meeting, with a particular focus on building engagement and trust with your customers.

We will also dive into the hybrid sales model, looking at what this means for the future of sales and how you and your organisation can combine the best of the virtual and physical worlds to deliver added value to your customers.

Notes

- [1.](#) State of the Conversation Report, The Next Best Thing to Being There, Sept. 24, 2018.
- [2.](#) Ibid.

Chapter 1: NAVIGATING THE WORLD OF VIRTUAL SALES

Adjusting to a new reality

As Kim reached for her alarm that was buzzing at 6:30 am, she had a strange feeling in her stomach. It wasn't the usual urge for a cup of strong coffee, it was a feeling as though she had woken up in a new reality.

Memories came flooding back, like news flashes. The night before the Prime Minister had announced a total lockdown across the country. She could picture fragments of the headlines: "Stay at home," "Global pandemic," "Save lives." Everyone had to stay at home if possible, and all the schools in the country were closed for a minimum of four weeks. They'd all seen it coming, the gradual creep of Covid-19 cases that was turning into a flood. Still, the realisation that nothing was normal hit her like a ton of bricks, while she was lying still wrapped in her duvet.

She shook her head, as if trying to shake the headlines out of her brain, and turned to her phone. This was how she always started her day. A quick scan of her calendar to get an overview of what lay ahead for the day. She was suddenly relieved that this week her ex-husband had their kids. *At least I'll have time to work, even if it is from home.* Kim was still looking at her phone as she rolled toward the side of the bed. She tapped into one entry in her diary at 10 am, and she half smiled. *My most important meeting of the year so far. When I close this deal, I'll be over my target ... and I'll get a nice bonus.*

Kim's thoughts were interrupted abruptly and painfully as she tripped, slamming her head into the wall. Her phone clattered to the floor. She'd been so preoccupied thinking about the meeting, her desire for a strong

coffee, and her uncertainty about this new normal that she'd forgotten about the step around the bed. *Who the hell puts a bed on a platform?!* She winced as she gingerly brought her fingers up to her forehead. At least there was no blood.

In her kitchen, Kim brewed her coffee and retrieved an ice pack from the freezer, placing it carefully against her now throbbing forehead. Sitting on a stool at her kitchen island, one hand holding the ice pack, she decided to take control of the situation. It was only 7:30 am. She tapped out a quick message to her contact for her 10 am meeting.

“Hi Paul, I hope you had a good night's sleep, despite the Prime Minister's announcement yesterday. I assume we are not safe to meet in person given the Covid-19 situation? Or what do you think? I am open to any suggestion you may have about how we can make this meeting today work despite the lockdown. Kind regards, Kim.”

One of the things she loved about her new phone was that it displayed when someone was in the process of replying to a text message. She saw the reassuring blue text “typing” appear in the corner of the screen just moments after hitting send. She could hear her heart in her ears. She put her phone on the counter and reached for her mug of coffee, taking a long, slow sip to steady her nerves. *I don't know what he'll suggest. I hope we can still go ahead with this meeting. It would make my year! And it would make the bump on the head hurt a little less Maybe I could use some of my bonus to get rid of that stupid raised bed?* Kim realised the ice pack wasn't doing enough, and that she'd need to go in search of painkillers soon.

“Beep!” The sound almost made Kim jump, even though she'd been expecting it. She took a deep breath before opening Paul's reply. It was a short message, despite how long it had taken him to respond.

“Hi Kim,

We will make it a virtual meeting instead. I will email you a link to a Zoom meeting half an hour before the meeting. Paul”

Kim's heart sank. *Uh-oh, a virtual meeting* Kim was one of the most successful salespeople in her team, and she was widely admired for her ability to connect with customers, manage even the most complicated negotiations, and close the biggest deals. Face-to-face meetings had always been Kim's strong point, and, until now, she'd successfully been able to avoid virtual meetings, where she felt that it would be difficult to leverage her strong in-person impact virtually. *How am I going to shine in a virtual meeting, through a screen?*

She finished her coffee, stood and made her way to the bathroom in search of painkillers for her now pounding headache. As she looked at herself in the mirror, she realised that a virtual meeting could be a blessing in disguise; a large bulge had become quite visible on her forehead and was turning a vivid blue and purple colour. *Maybe today of all days this virtual meeting is a blessing. I can't wait to get back to physical meetings once this is all over, though!*

Kim turned away from examining her forehead and started to run a bath. She left the taps running to go and make herself a second cup of coffee. Although the bath helped her feel a little more relaxed, it did little to get rid of the slightly sick feeling in her stomach and her, now slightly dulled, headache. Examining the bump in

the mirror again, she did her best to cover it with makeup, but wasn't overly worried that it was still pretty prominent as it was going to be a virtual meeting anyway.

She turned on her PC to log into her emails and see if Paul had shared the Zoom link for the meeting. It was ready, waiting at the top of her inbox. She clicked into it and instantly cursed as she read Paul's email. *Why didn't I pay more attention when I was getting out of bed this morning?!*

Dear Kim,

As agreed, find below a link to our upcoming virtual meeting.

Please turn your camera on during the meeting.

Regards,

Paul



A world of change

Virtual selling is becoming more commonplace, with a growing number of businesses realising that they need to adapt and learn how to sell in the virtual as well as the physical world. Our research found that 70% of companies are likely to run virtual customer meetings in the future.

The Covid-19 crisis has significantly accelerated this process. It has fundamentally changed the way in which

B2B (business to business) companies interact with their customers. Overnight, businesses had to transition from face-to-face meetings to virtual customer interactions.

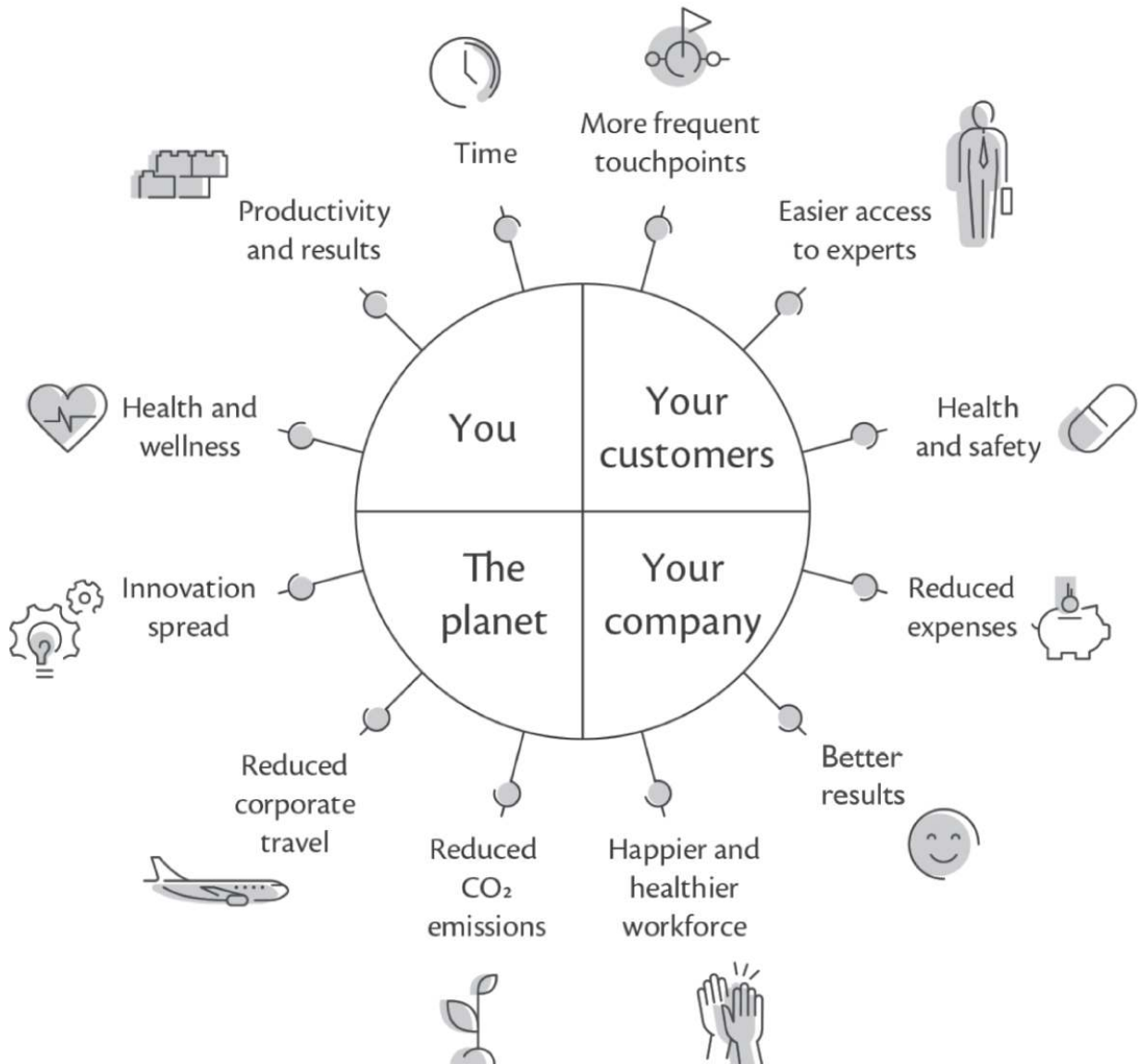
The sales industry has changed forever. This is not simply something that will go back to “normal” once travel restrictions are lifted. In fact, corporate travel is expected to remain extremely limited until 2023,¹ and quite possibly beyond. Even when national or regional border restrictions are lifted, many commercial organisations expect that their customers will be reluctant to welcome external partners on their premises.

While the rash transition to a primarily virtual customer engagement model has been a shock to many organisations and salespeople, it has presented a significant opportunity for those who are prepared to embrace virtual selling to transform their business model for a more sustainable, efficient, and cost-effective future.

Do the benefits of virtual selling outweigh the hassle?

Virtual selling presents many opportunities for businesses that do it well. It has benefits in four main areas: for you, for your customers, for your company, and for the planet.

Benefits of virtual sales



Benefits for you

There are three main areas where adopting virtual selling will benefit you as a salesperson: time, productivity and results, and health and wellness.

Time

Did you know that over half of business travellers state that being away from home for work impacts their personal