

# ENABLE SALES TO ELICIT MARKET INTELLIGENCE: THE COOPERATIVE ANGLE

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Over the years, competitive intelligence (CI) practitioners have universally complained about the trouble they have capturing CI from their salespeople. My first question is always, “What do you give to sales that would make them want to contribute back to you?” After all, salespeople do not report into the CI team, so you need to prove your worthiness to them by supplying information and insight they can use to increase their sales or improve customer retention. This is an ages-old discussion among CI practitioners looking to salespeople as the great source of timely, tactical CI that they are.

But have you considered that Sales could use some training on how to better collect CI, including technical intelligence, to improve your company’s competitive edge? We all deal with information overload through the many electronic sources available, including social networking, and we need help to make sense of it all.

Your sales force can help you put the pieces of the marketing puzzle together as they talk to customers every day. Their customers, who work in different levels and positions within their companies, can provide various perspectives on your marketplace. “Sales” also includes your technical support and customer service representatives, and contracts negotiators. However, in this short column I will focus on sales representatives.

## WHAT QUESTIONS MUST YOU ASK?

So how do you capture this intelligence? The first step is to identify

what needs to be captured: What questions must be answered to maintain your company’s competitive edge? Categories that most companies track include answers to:

- Shape product or service development
- Invest in research and development initiatives or acquisition candidates
- Enter new markets and geographies
- Uncover product or service opportunities
- Divest losing products or services

The next step is to prepare specific questions for each of these categories. For example, under “shape product or service development,” is there a new leading edge technology developing that is going to change your marketplace? Or does your company need to tweak many of their products or services to take advantage of its market leadership? You must include specific questions under each of your products or services that you want covered to keep your pipeline of enhancements and new products flowing in the right direction so that customers continue to buy!

## BRIDGE THE GAP WITH SALES

The Marketing and/or Strategic Planning organizations are already organizing this list of strategic objectives and questions, but the Sales organization is often not part of this process. In CI, we are in this loop, so we can help bridge that information gap for Sales. The sales organization needs to know the questions that Marketing and/or Strategic Planning wants answered, and why.

In my experience most sales people

are very interested in helping out once they understand the WHY behind these specific questions. They have a great incentive to find these answers since they want to sell the best products or services in the future. It’s also great for their job security, and gives salespeople some ownership for your company’s marketing direction, which is incredibly empowering. Some companies make this information collection part of their sales representatives’ job, and include this activity as part of their annual job evaluation process.

## SALES REQUIRES TRAINING TO COLLECT MARKET INTELLIGENCE

Companies spend considerable time and money training their salespeople on how to make the sale, from account planning, solving customer’s problems through selling them your services, and closing deals. Sales training typically includes applying personality profiling such as Myers Briggs and emotional intelligence.

Personality profiling techniques help salespeople become aware of how they are perceived by customers. It also helps them identify and communicate with customers in a way that suits the customer’s predisposition. Knowledge of emotional intelligence helps salespeople learn how to control their own emotions in the selling process, particularly stress, both their own and the customer’s.

Sales must ask the customer many questions and be good listeners to close deals. So they already have developed good interviewing skills for this purpose. However, salespeople must

make a transition to collect market intelligence. While developing the right products and services to market will help Sales close future deals, this doesn't help Sales achieve their quarterly sales quota. Therein lies the dilemma. Salespeople are typically incented and trained to close deals which support a short-term outlook. Collecting information to support market intelligence requires a longer-term outlook.

In CI, we are well connected with the Strategic Planning and Marketing departments, so we have access to those questions that must be answered to help our company maintain its leadership position.

We can train salespeople to broaden their interviewing skills to include elicitation techniques to collect market intelligence, which can be blended right into the sales process. In most cases, salespeople know how to motivate their customers based on their personality profile. Building off this, we can help a salesperson re-word our company's key marketing questions in a way that will motivate customers to share information. We can help salespeople plan how they will interview their customer during the sales call. Many of them already have great improvisational skills which are also useful in elicitation. However, planning and organizing this interview is often where salespeople often fall short.

We can instruct salespeople to listen for certain cues or signals which indicate that the customer knows more and is willing to share it. We also can train them to judge the credibility and completeness of the information that their customers provide. With the benefit of face to face meetings, salespeople can evaluate their customers' visual responses, often an indication of credibility. We can also teach them appropriate probing skills to dig more deeply without being offensive.

## TO SHARE OR NOT TO SHARE

You want this sales elicitation process to be a win/win situation for your company and your customer. Organize the company information that salespeople can share with customers, and what information they cannot share because it's a trade secret or too far into the future. It's very important to establish this distinction before your sales people interview their customers for market intelligence. Customers will have more questions about your company when salespeople use questioning or the conversational style of elicitation to gain market knowledge.

This is where sales elicitation differs from CI elicitation. In many cases CI professionals elicit information knowing we're unlikely to talk to that source again. On the other hand, salespeople are continually looking for ways to build relationships with their customers.

On both personal and professional levels, salespeople become more knowledgeable about the marketplace through this process. Informally this will help enhance their credibility and relationships with your customers. On a more formal level, certain findings from this market intelligence collection effort can be shared through a company newsletter to your customers.

## MAKE IT EASY FOR SALES TO SHARE

You already know your company's culture and the processes that salespeople follow within their organization. You need to establish a way to encourage them to share market intelligence findings, preferably as part of a sales report or another report that Sales already generates.

Make it easy: allow Sales to access these key strategic marketing questions through your company's electronic communication structure such as a wiki or Intranet and answer the questions

as information is collected. When a salesperson provides an answer, have him include his name as the source so others can contact him for clarification or questions.

## KEEP IT ALIVE

Strategic marketing questions are like key intelligence topics (KITs) in that they continually change based on market developments, what you learn, and your company's changes in vision and direction. Keep your sales people in this changing question loop, and tell them WHY the changes are being made. Ideally, solicit their input into developing these marketing questions. This activity helps create salespeople's buy-in, and gives your company a competitive edge that most companies don't have—timely market intelligence from sales people.

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