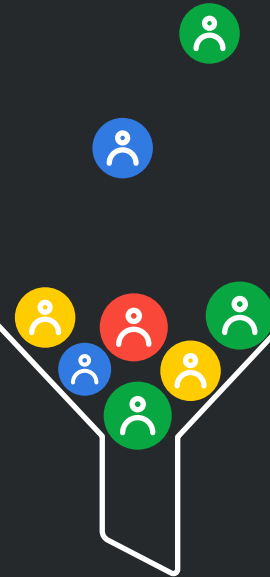


pipedrive



THE CONSULTING SALES HANDBOOK

CONTENTS

Build a Consulting Sales Process	4
Map Your Consulting Sales Process	7
Invest In Your Team	10
Invest In the Right Technology	13
Refine Your Value Proposition and Brand	15
Build Your Consulting Brand	19
A Blueprint for Successful Lead Generation	22
Conclusion	29

Consultants can make their sales process much simpler by recognizing that there are proven methodologies and technologies out there that can help.

In this guide, we'll show you how to optimize your sales process to generate more leads and close more deals.

You're going to learn:

- ✓ **How to fully understand your target market and buyers**
- ✓ **How to create a process that guides prospects from discovery call to sale**
- ✓ **How to train your sales teams and consultants to more effectively attract new clients**
- ✓ **How to stand out against the competition**
- ✓ **How to build a brand based on expertise**
- ✓ **Four proven techniques to generate leads for your sales pipeline**

Source: [Statista](#)

Despite the challenges consultancy services are facing on a global scale, the industry is still growing. This guide will help you continue to grow with the industry.

The US consulting market

\$54.8_{BN.}

2015

\$68.5_{BN.}

2018

BUILD A CONSULTING SALES PROCESS

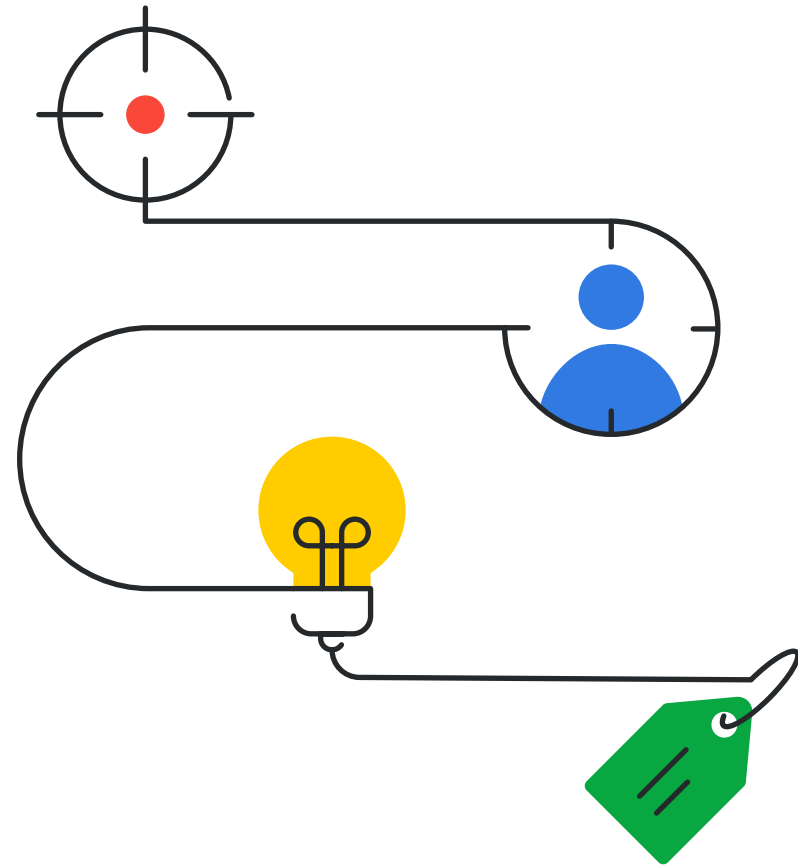
The first, most fundamental step to achieving great sales results is creating a reliable process.

This means you must map out every stage of your sales process and create communication guidelines and collateral that guide your prospects to the next step of your relationship.

The details will depend on your target market buyer personas, as well as your brand and solution. For example, if you're a web design consultant, these details may look like this:

1. **Target market:** Ecommerce
2. **Buyer persona:** CEOs or sales directors looking to sell their products online
3. **Solution:** Sales-driven websites
4. **Brand:** An experienced disruptor

Not only will this dictate the style of your messaging, but also how you communicate with your audience. In this section, we'll walk through how to create a sales process that takes these elements (and more) into account.



Start with your buyer personas

If you don't know who your target buyers are, now's the time to figure it out.

Following the example above, let's say you sell web design consulting services to companies in the eCommerce sector. This is your target market and learning more about them will help you align your messaging to their challenges and needs as a whole.

Your buyer personas, however, are the people who directly benefit from your services. For example, you might sell to "VP, Sales" or "CEO" roles. These people themselves have their own set of problems that they're eager to solve.

Define your buyer personas by recording the following information:

- 1. Demographics:** This includes basic information such as age, gender and where they're from.
- 2. Education:** Did they graduate from college?
- 3. Job titles:** As above, what function do they perform within an organization?
- 4. Challenges:** What are their day-to-day challenges and pain-points? What are they trying to achieve in their jobs?
- 5. Desires:** What do they look to achieve in their personal lives and careers?

Know who you're selling to, and you'll be able to craft messaging that resonates and reaches them where they're active.

Know your lead channels

Do you know where your inbound leads are coming from? Every consulting firm has one to three primary lead channels where the majority of inquiries come from.

As a salesperson or consultant yourself, understanding how clients find you is important for adding context around initial discussions. Here are some typical lead sources, along with how they might influence your conversations:

- 1. Referrals:** Word of mouth is one of the most common lead sources for consultants. So, who referred this lead to you? Why did they refer you in the first place?
- 2. Organic:** Did someone find you from Google? What did they search for and why did they choose to schedule a call with you over other options?
- 3. Social media:** If you're creating content on platforms like LinkedIn, what was it you said that resonated with your lead?
- 4. Content marketing:** Blog posts are not only a great way to drive awareness, but capture leads too. What value did leads see in your content and what inspired them to reach out as a result?

These examples should give you an idea of how marketing channels may ultimately influence your initial conversations.

Not only that, but you can use this insight to report back to marketing what's working best. For example, if referrals are your biggest source of new business, it might be worth building a referral system that rewards existing clients for bringing you new business. We'll show you how to do this later.

6.7 IN **10**

of the most impactful marketing strategies for consultants are related to the web.

Source: [Hinge Research 2017 High Growth Study](#)

MAP YOUR CONSULTING SALES PROCESS

Before we cover this subject, it's important to know that sales conversations are not linear. Things don't simply go from appointment to proposal, to negotiation.

Indeed, sales is all about relationships, which are fluid, diverse and often messy. Therefore, your sales process should act as a guide, not as a map that must be diligently followed.

Of course, if you hire smart salespeople, you shouldn't need to explain this. We're not robots, and we know sales can sometimes be scrappy. Acknowledging this in your sales training will encourage autonomy across your organization.

With that out of the way, let's look at what the typical consulting sales process looks like. Most consulting firms must go through the following steps to guide a new lead to becoming a client:

- 1. Inbound inquiry**
- 2. Discovery call appointment**
- 3. Proposal creation**
- 4. Sales presentation**
- 5. Negotiation**
- 6. Contract signed**
- 7. Deal closed**

It looks nice, clean and straightforward. However, that's not often the case. Take the steps between discovery and proposal, for example. You might think you have everything you need to provide a winning sales pitch, but if you've not taken the needs of other stakeholders into account, you'll end up having to start from the beginning.

As well as mapping out the entire process, you need to map out the processes within each individual step. For example, when an inbound inquiry comes in, you may need to follow these steps to generate the appointment:



1. Qualify the lead to ensure they're a fit

If so, send a “thank you” email with a [Scheduler](#) link to book an appointment

If you're unsure, send an email asking for more information

If they're not a good fit, email them with other alternatives



2. Once the appointment is scheduled, research the lead

Look at their LinkedIn profile

Look at their website

Research their company in the press

Check out their content

Investigate the company structure to ensure all decision makers are on the call



3. Prepare an outline for the call

Follow the process for a discovery call

Personalize based on needs defined in the inquiry

As you can see, this one step alone isn't as straightforward as it seems. There are moving parts that require some research.

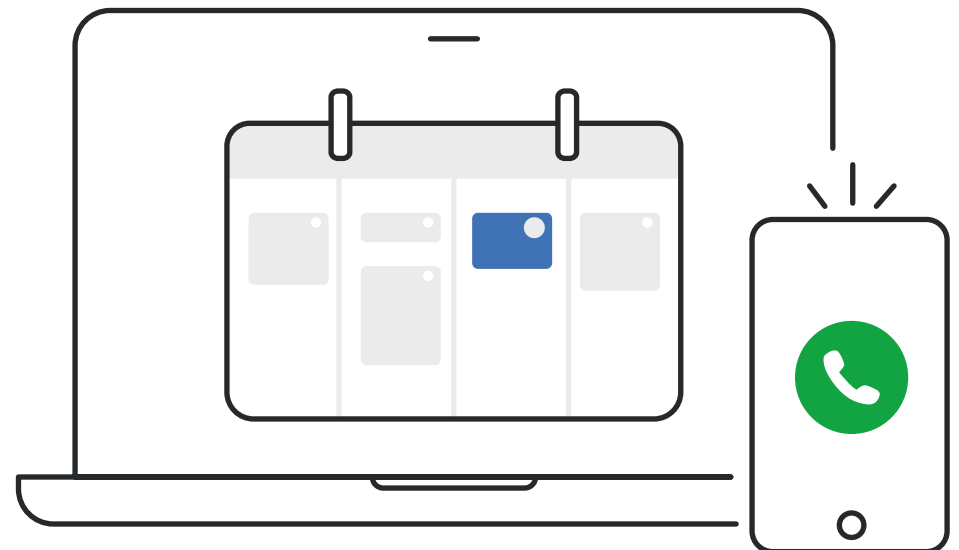
You may also come across some setbacks. For example, during the negotiation phase, your prospect may come back and say some of the elements of your proposal aren't a priority, and that they'd like to look at other areas of your service. This means going back to the proposal phase, fixing it up and presenting it to your prospect again.

Knowing the nature of “the game” will help you stay ahead of the curve.

If you know that it’s important to have certain decision makers on the call, you can make this clear in your email when setting the appointment. You can create thorough guides and training for other salespeople, account managers and consultants within your firm to follow.

The great thing about sales training is that it’s fluid. As you come across common setbacks and [sales objections](#), you can incorporate this into your sales training and processes.

This can shorten the sales cycle and even help you close more deals, simply by ensuring you’re capturing the right information and guaranteeing all decision makers are involved in the sales process.



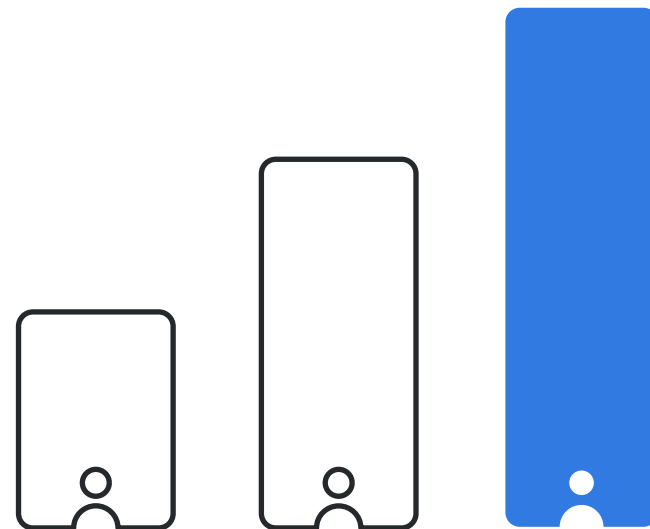
INVEST IN YOUR TEAM

It's crucial to invest in your team to generate growth.

As your firm continues to grow, you'll need a solid structure in place to productively scale. If you try to build too quickly without the proper procedures in place, you'll end up throwing a lot of time and money out of the window on mismatched candidates and on-the-job training.

These are three pillars to keep in mind as you plan for growth:

1. Build solid onboarding and process adoption plans in place in order to bring new members up to speed effectively.
2. Create a simple and effective sales process that is easy-to-learn and effective
3. Structure your team to facilitate growth and make it effortless to add members to the fold.



Organize your sales training to empower your team

With the process mapped, you'll need to get everyone involved with your sales operation up to speed.

This is one of the biggest benefits to sales process mapping. It creates a guide that can be followed by everyone on your team.

Of course, these processes can't replace good old fashioned soft skills. You'll still need to [hire talented salespeople](#) in order to build a high-performing [sales team](#). However, even top performers need guidance on how you do things.

Sales training should, ideally, include four basic components:

1. In-depth guides that clearly communicate what is expected and required at every stage of the sales process
2. Documentation that outlines certain technical processes step-by-step (for example, how to create and personalize [email templates](#) in [Pipedrive](#))
3. Sales workshops where managers guide reps through each step of the sales process
4. Ongoing, one-to-one feedback and guidance for each rep, account manager and consultant in your organization

Everyone learns differently. Similarly, everyone has their own sticking points. It's up to you as a consultant, or sales manager within your organization, to keep a keen eye on how your reps are performing. Identify these weak spots and help them to overcome them.

Sales team management

Running a consultancy firm, like sales, is not a linear process and reevaluation will help you stay at the peak of your game.

Defined goals, forecasted expectations and an organized and automated CRM software are all key factors for effective [sales management](#). A sales manager needs to be intimately familiar with the projected targets and actual numbers in order to effectively manage a team.

However, as your consultancy firm grows, you'll need to constantly reevaluate your goals. Inevitably, something will get in between your projected and actual results in any given week, monthly, quarter, or year.

Sales managers should focus on four key metrics:

1. Number of deals in the sales pipeline
2. Average conversion rate
3. Average deal size
4. How long it takes for a lead to become a customer

A sales pipeline with clearly defined stages is crucial to a sales manager's success. The ability to track customers through every stage of the life cycle, and cross-reference those customers with forecasted metrics, are the building blocks for productive sales team management.

INVEST IN THE RIGHT TECHNOLOGY

With your processes mapped, the idea of doing all the work manually can seem daunting. From [cold calling](#) to email outreach and task management, there's an easier way to manage your sales than using a hodge-podge of spreadsheets and documents.

By investing in the right technology, you can streamline and even automate various areas of your sales process. And the best place to start is with a [CRM](#) system.

With a CRM system, you, your consultants and sales team can:

- 1. Manage all leads:** Handle all your opportunities, clients and sales activities that need completing from a single repository
- 2. Keep an eye on metrics:** Tracking your core KPIs in a spreadsheet is time-consuming and liable to mistakes. With CRM reporting and a good [sales dashboard](#), you can keep a broad view of how your sales operations are performing, and monitor everything is moving in the right direction.

- 3. Secure data:** With the advent of GDPR and new security risks, having your data secure is imperative for all businesses. By using a CRM system, data compliance is up to the supplier, and they invest heavily to ensure everything is as secure as possible.

- 4. Collaborate:** As prospect and client data is collected in one place, this means other areas of the business can benefit. This includes marketing teams, other consultants, and even HR teams.

Most importantly, a CRM will help you attract and convert your ideal clients. The more data you collect on prospects, the easier you can qualify whether or not they're a good fit.

Your Consultancy Sales Stack

In their [2018 report, Source Global Research](#) picked out the pace of the change of technology as one of the key challenges consultancy firms face. So, how can you stay ahead of the curve? Here are seven tools that could be integrated with your processes to improve productivity.

pipedrive

[Pipedrive](#) is a top-reviewed sales CRM software that gives you a simple but in-depth view of your sales pipeline. You can use it to track potential clients from first contact to first contract and beyond.

ActiveDEMAND

Automate your marketing with [ActiveDEMAND](#), whatever industry you're in. However, if you're a marketing consultancy, ActiveDEMAND could even provide you with a suite of specific marketing automation tools.

asana

With project management tool [Asana](#), you can visualize your 'to do' list for any client in a way that makes it far easier to track, whether you're working as an individual or as a team.

OUTFUNNEL

[Outfunnel](#) is a sales-centric marketing automation tool that integrates with modern CRMs (including Pipedrive). Use Outfunnel to automate email marketing campaigns and track email and website behavior.

pointagram

Motivate your team with [Pointagram](#), the gamification tool that enables you to create fun sales target competitions and visualize them on a screen in your office.

slack

Consultants will often work in a team, managing separate tasks in the same project. Chat service [Slack](#) enables them to stay in touch 24/7 with colleagues, whether they're at their desk or on the move.

Prospect.io

[Prospect.io](#), as its name suggests, is a prospecting tool. Use it to find the email addresses, phone numbers and job titles of potential clients. You can even use it to find new potential contacts within client businesses.

xero

If you're a consulting business, you have to be flexible. That means different plans, different prices and many different invoices. [Xero](#) makes your invoicing far easier, giving you a real-time view of your cashflow.

circleloop

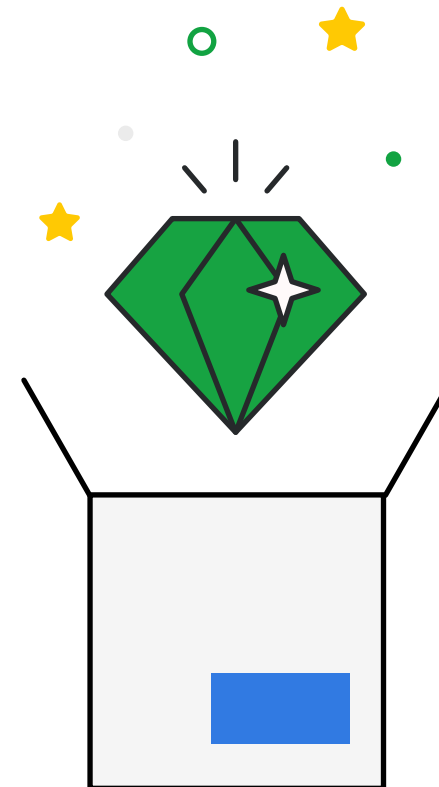
Consultants are often working for or on behalf of multiple clients, which requires multiple phone numbers or destinations. With a digital platform like [CircleLoop](#) you can get set up without fuss, wherever you are.

REFINE YOUR VALUE PROPOSITION & BRAND

Your solution is the vehicle that delivers value to your clients.

How you connect that solution to the most pressing pain-points is critical. This will not only help you communicate the value to your client, but attract and close the right prospects.

Let's look at how to create a strong value proposition that gets to the heart of your client's challenges.



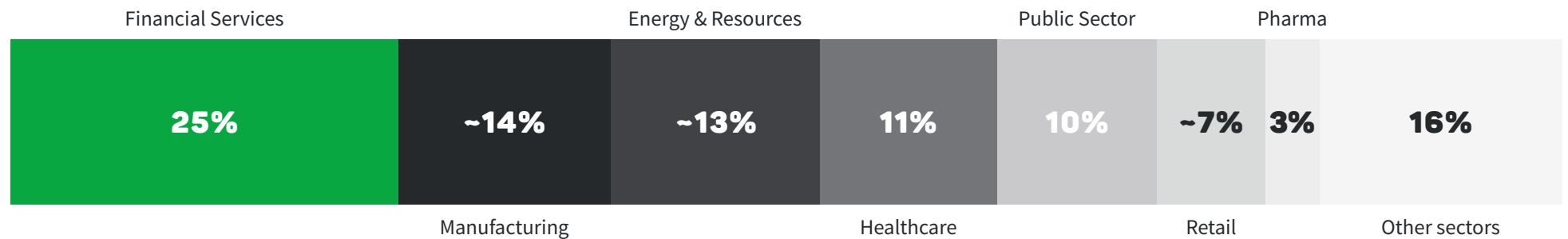
Conduct deep industry research

Start by speaking to people who operate within your target industry, particularly your clients. Ask them what their biggest challenges are at the moment, and what struggles the business faces within the industry's ecosystem. It's also a great opportunity to expand upon your buyer persona documentation.

It's also likely that publications, bodies and other third parties have conducted studies and research on your industry and market.

For example, if you're a marketing consultancy, download [Orbis's Global Marketing Consulting Market Report 2019](#).

Source Global Research data, meanwhile, gives you a good idea of the size of each market in the US:



Source: [Consultancy.uk estimates, based on analysis on Source Global Research data](#)

Develop a clear value proposition

As well as a solid understanding of your target clients, you must also understand your business, your solution and what makes you different in the market.

This, coupled with the insights collected above, will lead to a compelling value proposition and marketing message.

Start with your existing clients. During your conversations, ask them the following questions:

1. What attracted you to us during the early stages of the relationship?
2. Why did you decide to invest in our services?
3. Where do you feel you get the most value from our services?
4. What makes us different to other vendors you've used in the past?

Talking to your clients is one of the best ways to figure out what makes you different. The other is by analyzing your competitors. There are a few ways you can figure out what gaps your competitors are leaving unfilled:

1. Look through their website and check out their content, case studies and marketing messaging
2. Going through their sales process as a prospect to see how they position themselves in those conversations
3. Speak with their existing and past clients to learn why they worked with them

By following these lanes, you now have a better idea of why clients love working with you and gaps within the market you can fill.

Develop a value proposition that communicates how you solve specific challenges in more effective or efficient ways.

Start with the objective problem you solve, or the result you help clients achieve. What is the end goal you help them reach? This could be “generate more leads” or “reduce wasteful costs.”

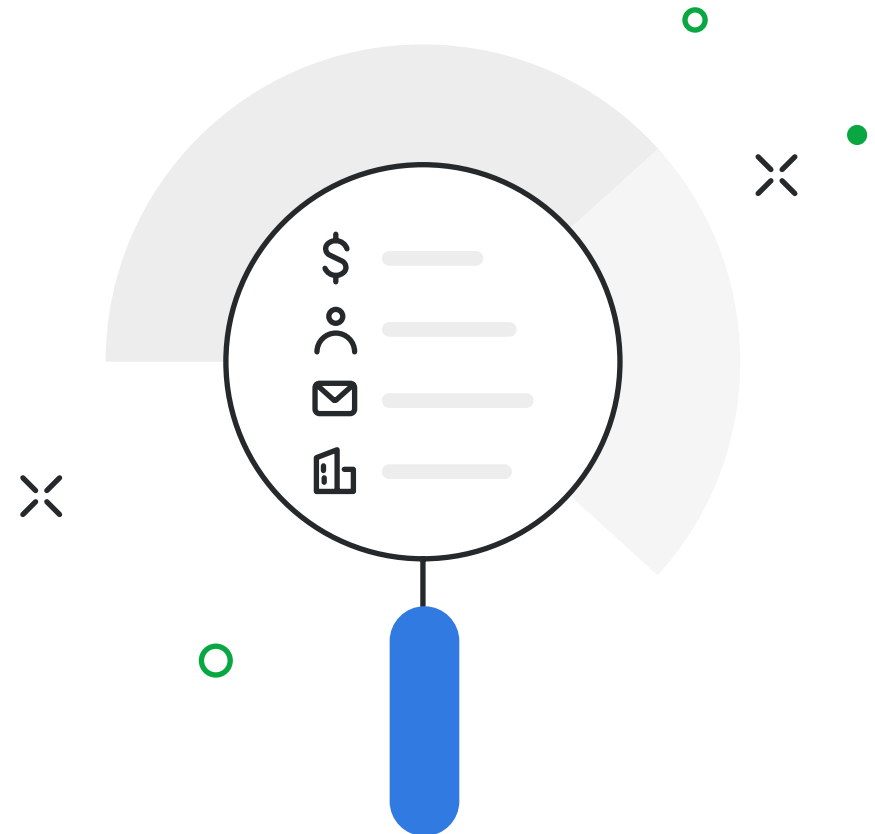
Next, focus on how you do it. You’d be surprised by how many organizations care about this. For example, your strategy as a marketing consultancy is usually to create blogs to drive traffic for clients, but a potential client is more interested in video marketing.

Understanding your market is important. What are the core challenges that you solve and how do you achieve them in line with your client’s tangible needs?

This should all come together to create the following statement:

“We help [AUDIENCE] [GET RESULT/SOLVE PROBLEM] by [WHAT YOU DO].”

It’s a simple but effective way to communicate your value proposition and keep your entire organization aligned with it.



BUILD YOUR CONSULTING BRAND

Whether you know it or not, your consultancy has been building its own brand since the day you started it. Take control and shape it into something you can be proud of.

Your brand is made up of your reputation in the market and its visibility to those who operate in it.

By building and demonstrating your expertise, you'll attract new business opportunities by way of adding value. This value can be delivered in the form of:

Blog posts: Guides and articles that show your target audience how they can solve relevant problems, or outline processes you use in-house to give prospects a sneak peek of how you work.

Video: In-house consultants and experts can step in front of the camera and talk about a pressing or common challenge.

Whitepapers: Create PDFs that present strategic frameworks or high-level ideas around relevant topics.

Case studies: Content that outlines a challenge your clients faced, and how you helped them solve it.

Social media: Take to LinkedIn and other platforms to connect with others in your space, answering questions or offering value to build meaningful relationships.

This content can also make your website stand out, which is often important in a competitive market.

1/3

professional services buyers have ruled out a firm because they haven't been impressed by the website.

Source: [Referral Marketing for Professional Services Firms](#)

Use content as a lead generator

High-quality content is a great way to generate leads.

Your blog posts, videos and case studies aren't just brand-building tools. They can also attract your ideal clients and convert them into inbound leads.

When writing your content, make sure it truly adds value. Include the following:

1. Use **statistics and data** to back up the points you make and the advice you give
2. Include plenty of **imagery, graphs and diagrams** to illustrate strategic ideas and tactical advice
3. Provide plenty of **actionable advice** that teaches the reader, not just informs them
4. Wrap it in a **great user experience** that is easy to read

Remember to always include calls-to-action that allow the reader to take the next step in their relationship with you.



Promote your content through several channels over a period of time.
Common content channels include:

- 1. Organic search:** Ensure your content is optimized for Google, focusing on a relevant keyword that your audience is searching for.
- 2. Social media:** Repurpose your content into Facebook, LinkedIn and Twitter posts.
- 3. Communities:** If you're a member of any online groups, be sure to share your content with those who will find it of interest.
- 4. Your clients:** Don't forget about the clients you've already got. They may share it with their peers, extending your reach with little extra effort.
- 5. Paid media:** If you have the budget, give your content an extra boost during the first week through Facebook Ads and other paid media platforms.

A BLUEPRINT FOR SUCCESSFUL LEAD GENERATION

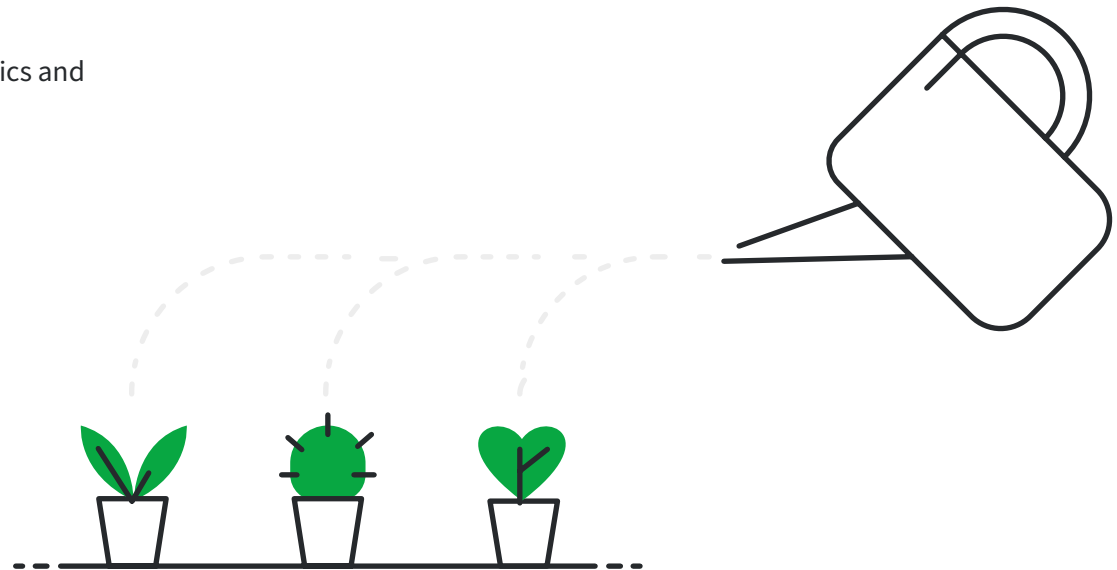
You should now have a solid sales process, the technology to empower your consultants and salespeople, as well as a clear value proposition to demonstrate how you're different.

Now it's time to fill up that sales pipeline. After all, a great brand will help you build your trust and reputation. But it's not going to get people knocking at your door begging to become clients.

In this section, we'll run through a handful of [lead generation](#) tactics and [sales activities](#) you can experiment with today.

34%

of B2B organizations say they work on their lead nurturing every month.



Source: [B2B Marketing Insider](#)

Master sales techniques

Lead generation can be approached from many avenues.

In the sales world, it's all about having top-notch techniques that keep you one step ahead of your competitors.

Skills like cold calling, cold emailing and social media outreach are an art that every salesperson should master. It's not that you necessarily have to be better at picking up the phone and selling a product, it's that you have to be more diligent and persistent in your process.

For example, set aside a weekly time slot for batch cold calling to connect with your target audience. Generate interest in the first few seconds of the call and keep them on the line as long as possible to land a follow-up meeting.

There are many tools that help salespeople automate these key sales techniques. Automating helps consultancy firms stay on track with outreach and frees up time to nurture customer relationships and close deals.

Build your personal brand on LinkedIn

While working on the brand of your consulting firm, why not build your personal brand at the same time?

One of the best platforms to do this is LinkedIn. The platform is rich with your ideal clients; all you need to do is get in front of them.

Does your LinkedIn profile effectively communicate what you do and how you can help your target customers?

Here's a quick checklist to help you optimize your LinkedIn profile:

- 1. Profile picture:** Use a professional headshot that clearly shows who you are, preferably where you're smiling.
- 2. Header image:** Include an image that helps boost your credibility, perhaps by featuring publications you've been featured in or clients you've worked with.

3. Headline: This is an opportunity to share your value proposition.

4. Bio: Get into the details of who you help, how you help them and what exactly you do.

5. Recommendations: Aim to generate some of these from your peers or existing clients.

Engage and nurture leads through social channels

The more you can grow your online presence, the bigger chance you'll have of finding leads. While LinkedIn is the frontrunner, there are other social media channels that breed lead-generation growth.

Facebook, Twitter and Instagram all offer great lead-generation platforms. Instagram lead ads, for example, are perfect for promoting products through attention-grabbing images. An interested user clicks on the ad and is brought to a landing page that you can tailor towards lead-gen.

When you're developing ads on any social platform, you need to know who you're targeting to maximize your chances of reaching your ideal audience.

This will vary by platform, but using LinkedIn as an example, we recommend filtering by at least these 3 factors:

- 1. Locations:** If you serve a specific geo, be sure to include this as a filter
- 2. Industries:** Type in the name of the industry you serve
- 3. Title:** The job title of those you target

Source: [LinkedIn May Workforce Report 2019](#)

150_{M+}

employees and employers in the US have LinkedIn profiles.

Use the results of your targeting

The next step is to send a connection request that motivates them to accept your invitation. The best way to be memorable is to be personal, and the two best ways to personalize your requests are:

1. Mentioning something of value you can give them (e.g. featuring them in a blog post)
2. Mentioning something you share in common

Here's an example of how this looks in practice:

“Hi, I’m currently writing an article for [INDUSTRY PUBLICATION] and was wondering if I could get your thoughts on [TOPIC]. Would you like to get involved?”

Once you're connected, you need to deliver on the value you promised (if applicable) or start engaging with them in discussion across the platform.

Do this for a week before reaching out to them. When you do reach out, make sure you do it in a way that adds value, if you didn't already in the initial outreach.

Decision makers are constantly bombarded with messages so cut through the noise and start the conversation based on value. Tie your consulting solution to their needs, based on initial discussions in order to lead them into your sales pipeline.

Identify and forecast problems

As your consultancy firm grows, you'll need to constantly reevaluate your goals. Inevitably, something will get in between your projected and actual results in any given week, monthly, quarter, or year.

In order to maximize success, it's best to evaluate your teams' process and progress every few months and adjust behavior as needed.

Consider all of the variables before, during and after solidifying goals. In sales, goals aren't solid, they're fluid.

Some examples of [sales forecasting](#) metrics include:

1. Number of leads generated
2. Number of follow-up meetings booked
3. Number of lead-to-customer conversions
4. Number of cold calls, cold emails and social media messages sent
5. Sales rep training efficiency

You don't want a sales rep grinding to hit \$20,000 in Q1 sales if the economy is in a downturn or your biggest client just walked away. Forecasting saves you, and your team, from burnout and striving to achieve unrealistic expectations.

Forecast demand when you're scaling

It's important to stay on top of ever-changing market trends, cultural shifts, economic swings and drivers in demand.

Rather than being blindsided by factors outside of your control, it's best to forecast and understand your own and your clients' markets to better predict outcomes.

In the UK, for example, consulting firms have encouraged clients to act quickly to challenges posed by Brexit and other factors in order to [grow the consulting market by 6.1%](#).

As well as downloading studies, you can evaluate the market by looking at your existing and new products and by tracking performance with old and new clients.

If a new client is buying new, but not old, products, you need to understand why. What about your new products resonates more with this new client? Conversely, if your old clients are sticking with your old products and won't touch the new ones, that's a good indicator that your new direction is not in touch with their needs.

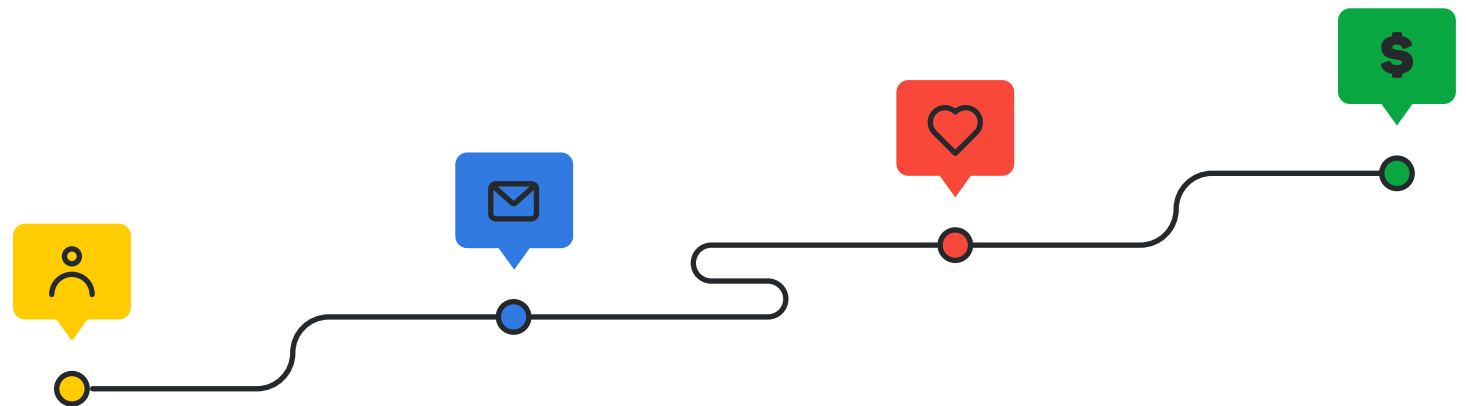
From here, you can adjust your sales goals by setting realistic expectations based on your client portfolio's diverse, and often distinct, differences.

CONCLUSION

Growing your consulting firm is all about attracting ideal clients and fostering strong relationships. No matter how big your operation is, this is a delicate art that can't be scaled through technology alone.

Yes, CRM systems and other automation platforms will make you and your team more efficient. But without a sales process that shows prospects how you can help and provides them with value, that technology is meaningless.

This means getting a full understanding of your audience and mapping a process that guides them through your relationship. Create the right training, systems and content and you'll generate a wave of new clients in no time.



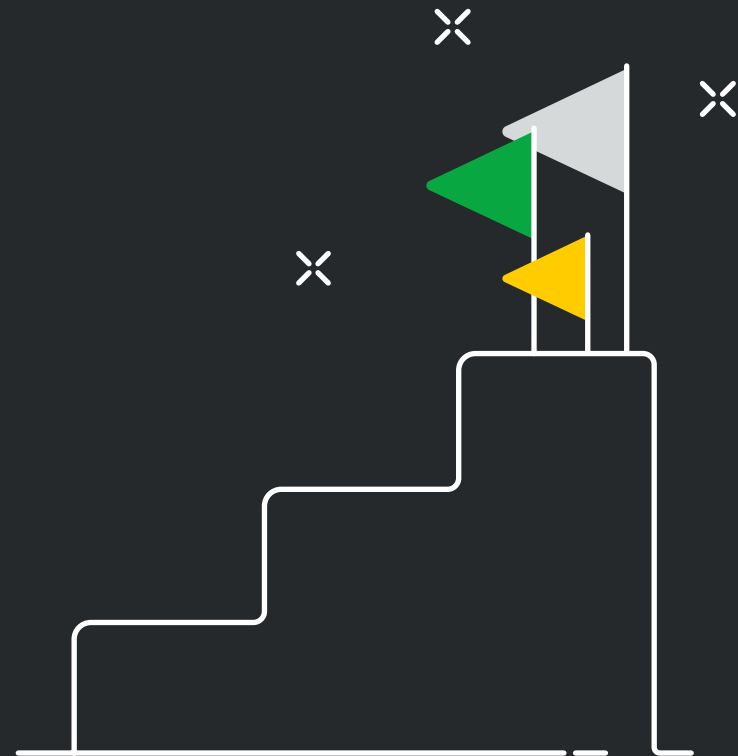
PIPEDRIVE FOR CONSULTING

You also need the right tools.

Pipedrive is an intuitive, versatile CRM that can help consultancy firms of any size attract more clients and nurture the leads they have. Pipedrive's visual pipeline and drag-and-drop interface allow you to manage your entire sales process with ease and simplicity.

1. Get a clear overview of your pipeline to help you forecast sales.
2. Set activity goals and easily measure progress.
3. Keep track of the four pipeline levers: the number and size of deals, conversion rate and deal velocity.
4. [14-day free trial](#) before signing on to a plan that suits your needs.
5. Integrate Pipedrive with over 130 apps to automate and streamline your processes.

To try our services for free, visit [pipedrive.com](https://www.pipedrive.com).



pipedrive