neon NOISE PODCAST

Episode 9: The Inbound Sales Process with Rachael Plummer

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00:00 Ken Franzen: Hey everyone! This is Ken from Neon Goldfish. Buyers have changed, and it's clear that we have to adapt the way we market to them. But what about the way we sell to them? The traditional sales model's dying. Cold-calling and pitching is becoming less and less effective. So where do we go from here? In this episode of the Neon Noise podcast, we have a very special guest. Rachael Plummer from HubSpot joins us to explore the inbound sales process. We dig into the biggest sales challenges that businesses face today, what happened to the traditional sales process, what inbound sales is, the four stages of the inbound sales methodology, and some actionable items you can do today to help you re-align your selling efforts with inbound sales. We hope this conversation with Rachael provides some valuable takeaways you can apply to your sales process. Enjoy!

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01:04 Justin Johnson: Hey everyone, and welcome to this episode of the Neon Noise podcast. We have a special guest on today. We are gonna be chatting with Rachael Plummer of HubSpot. She is an absolute rockstar when it comes to marketing and sales. Just to give you guys a little bit of background, Ken and I have been working with Rachael for right about two years now. She is our agency account representative at HubSpot and helps us from everything from prospecting to converting leads, and ultimately, closing customers. I can say that we've definitely closed deals with customers that we would not have without the assistance in the sales process. Hands down, there's absolutely no question to that. We meet with Rachael on a regular basis to discuss sales and marketing efforts, and figured that she will be awesome guest for this show. She has a wealth of information for marketing and sales, and we feel our listeners just need to hear it. So let's get into it. Hey, Rachael, thanks for coming on and chatting marketing and sales with us today. We truly appreciate your time. How's everything going for you today?

01:58 Rachael Plummer: Hello! Thank you for such a warm introduction. Things are going great! I'm excited to be here.

02:05 Justin Johnson: Awesome.

02:06 Ken Franzen: Justin, one thing I think you forgot to mention in that opening is how much of a rabid Jets fan she is.

[laughter]

02:14 Ken Franzen: She loves the Jets, right?

02:16 Justin Johnson: J-E-T-S, Jets, Jets, Jets, right?

02:17 Rachael Plummer: Oh, let's not lie this morning.

[laughter]

02:21 Justin Johnson: Oh, I love it.

02:22 Ken Franzen: To clarify, Rachael is a Pats fan.

02:23 Rachael Plummer: I think yes, we need to clarify that.

02:26 Ken Franzen: I don't want any of her family members to tune in and listen to this and think that she went to the dark side. So yes, we know you're a Pats fan.

02:36 Rachael Plummer: Thank you, I don't wanna be disowned from my family this weekend.

02:40 Justin Johnson: No, no, not at all.

02:42 Ken Franzen: Or any weekend, for that matter, right?

02:43 Rachael Plummer: Right, exactly.

02:44 Ken Franzen: Awesome! Rachael, Justin gave that introduction. You're with HubSpot in... To get started, I think it might be helpful to maybe touch on who HubSpot or what HubSpot is, and then, kinda progress from there because it'll be a backbone for some of our future conversations. Could you give our listeners a quick overview of HubSpot, what it is, what it does, all that fun stuff?

03:10 Rachael Plummer: Definitely. At the heart of it, HubSpot is really a marketing automation platform. We kinda acquaint ourselves as an inbound marketing software solution, as well as a CRM and sales acceleration tool now. If you think about your business managing anything on the marketing side from generating traffic to your website through blogging, SEO, pushing content out to social, to actually converting that traffic into leads, and then, nurturing those leads into customers, you can manage all of that through HubSpot. And then, on the sales side, it's managing all of your daily sales activities, your prospecting, your forecast, your actual management of your leads and opportunities, you can do that all through the platform.

03:57 Ken Franzen: Excellent. And we've used HubSpot ourselves within our agency, and we help other businesses. And it is fantastic software, amazing how much it actually does tie everything together. Now, as far as your role at HubSpot, what do you do at HubSpot? What's your day look like from day-to-day? And tell us a little about that, please.

04:25 Rachael Plummer: Sure, I have the pleasure of working with people like you guys all day long.

[laughter]

04:30 Ken Franzen: Ah, well.

[laughter]

04:32 Rachael Plummer: No, I'm just kidding. I am a channel account manager at HubSpot. What that means is I actually work with about 75 marketing agencies, really, just on anything that they need help with. Whether it's, "Who should we hire?" or "How should we scale?" to focusing on their sales efforts, increasing the size of their retainers, helping them to close new business, and at the end of the day, also, to resell HubSpot. Been here for about five years, been on the partner side for about three, and I love working with agencies, it's very rewarding.

05:11 Ken Franzen: Now, what was your background before HubSpot? What did you do before you joined forces with them?

05:20 Rachael Plummer: Yeah, I got caught up in that daily deal trend, actually.

05:23 Ken Franzen: Okay.

05:23 Justin Johnson: Oh, daily deals.

05:25 Rachael Plummer: Yeah, I actually was doing a job that is what I preach against everyday now, which was cold-calling a bunch of businesses and selling them on daily deals. I was in sales for a while, and yeah, it was a grind, for sure.

05:42 Ken Franzen: Alright, and that's interesting because the topic we're covering today is inbound sales. And a lot of what your expertise right now is this process of inbound sales, really, you introduced it to us at Neon Goldfish. And it's interesting that you have that background of what you do sell against that, those experiences to reference.

06:10 Rachael Plummer: Yeah, yeah. It's interesting, when I joined HubSpot... And we can get more into inbound sales. But it was taught to me and I was just like, "Wow, this makes so much sense, what have I been doing all this time?"

06:22 Ken Franzen: Why have I been doing all this cold outreach?

[chuckle]

06:25 Rachael Plummer: Yes, exactly.

06:27 Ken Franzen: No, it is like smack in the forehead when you come across it and realize... It makes absolute sense. Knowing all this, what are some of the biggest challenges that you see, 'cause you work with... You mentioned you worked with 75 partner agencies and you have been through the trenches in working with businesses directly at HubSpot. You have a real good understanding doing this day in and day out, in the role of selling. What do you feel are some of the bigger challenges that businesses face when it comes to sales today?

07:06 Rachael Plummer: Yeah, good question. I think people are all over the place. I think the biggest thing I see... Or I guess the largest pain point, is when people are just really stuck in that old way of selling. It's okay to reach out to people who have maybe never heard from you before, but they're doing it in a way where they're pitching and just kind of really selling themselves hard. And it can be really hard to transition off of that kind of antiquated sales methodology. I also see people just not using any sort of sales technology. A lot of the businesses I talk to... And they're embarrassed by it, they'll say, "Yeah, we're just kinda using Excel to sort everything." That's really interesting to me just because... And me, in my day-to-day, I get prospected just working at HubSpot by people selling all kinds of things and they don't know that maybe they talked to me three months ago, or maybe they emailed me six months ago, because they aren't using any actual kind of CRM or sales software. That's another challenge that I see with a lot of folks and it's really hard to get salespeople to adopt a sales platform. You would think that they'd be excited about it and they'd want to use this everyday to keep track of everything, but they aren't. And they have a really, really, really hard time actually logging everything and adopting that process.

08:36 Ken Franzen: Do you think that's just because out of the nature of how a salesperson's wired? Or most salespeople are wired? That they have a challenge in that, that the data entry component that's involved with that is just like paperwork? Salespeople are notoriously not the best at paperwork.

08:53 Rachael Plummer: Totally, I think salespeople have an attention to detail for some things and, then, so not for other things. You can just ask my manager how well I log things...

[laughter]

09:05 Rachael Plummer: In our CRM, but... Yeah, I don't know what it is. As a salesperson at heart, I feel like I am adverse to it as well. I think about it, I'm like, "Oh, I have to log this, I don't want to." I don't know what it is, but yeah, I think it does have something to do with the way salespeople are wired, for sure.

09:21 Ken Franzen: Absolutely. And back to the one thing you mentioned, with the business owners, they kind of jokingly state that, "Yeah, we're using Excel to manage this," and they're somewhat embarrassed. They know that they have this issue. What do you think is the reason that they've continued to live with an inferior solution for so long?

09:43 Rachael Plummer: Yeah, I think it's... Well, I think it's two-pronged. People are scared of change. They're worried that it's gonna disrupt generating revenue, which is what's most important. They just keep doing what's broken to make sure that their business keeps going without really interrupting the day of the sales rep. And then, I think the other side of it is a lot of platforms are really clunky and intimidating, and people are scared of them. And they're not intuitive, and it's hard to go in there and actually make it effective. If I'm gonna log something, I want this to automatically show me what my forecast is, or show me something that makes sense to make my job better. And a lot of platforms are more for management or marketing than they are for the actual rep.

10:33 Ken Franzen: Sure, yeah. And so that gratification at the level that the person actually doing the input is necessary, right?

10:41 Rachael Plummer: Yep, yep, exactly.

10:43 Ken Franzen: Alright. We had made mention of... And we are gonna get into inbound sales, but the world's changed drastically and I think technology has been the driving force behind that. I wanna touch just a little bit about the traditional sales process. 'Cause you made, mentioned earlier you were in the Daily Deal Industry and you had a pitch that you interrupted people's days with, right?

11:10 Rachael Plummer: Yep.

11:11 Ken Franzen: And that would be more of the traditional sales process that we're all familiar with. We see different movies, like Glengarry Glen Ross, or the... My favorite, Boiler Room, where they're calling and pitching people on the phone. That's not the exact way that the world works now, and changes are on the horizon. What do you think is the cause of this change? Where do you think everything is headed?

11:42 Rachael Plummer: Yeah, yeah, you're spot on. If we think 20 years ago, someone would call you, convince you why you needed something, and then you would buy. And I think Google changed that for us. It's one word, Google. Yeah, people just... We're smart now, we know how to tune it out, we're gonna ignore your phone calls, we're ignoring your spam emails. We know that if we need something, if we have a pain, we're gonna go to Google. We're gonna search for solutions. We have all of the information in the world at our finger tips.

12:16 Ken Franzen: Right.

12:17 Rachael Plummer: We can read reviews, we can see different options, we can price shop. Everything is right there for us and because of that the sales rep's role has completely changed. And it's really just made it so that the buyer is the one who is in control now.

12:35 Ken Franzen: And with this change, the shift in gears that the consumers made, there has to be a shift in the way that we go about selling to them, right?

12:47 Rachael Plummer: Yep, absolutely. I think it's more now about trying to identify what their pain points are and helping them work through it. Figuring out as a business, what are their goals, what kinds of other challenges do they face? And trying to make your solution work for them from that context, rather than: "Here's our solution, you should buy it."

13:11 Ken Franzen: Right. Exactly. I think this is a great segue into the formal term of inbound sales because a couple podcasts ago we brought in and covered inbound marketing which is, I think, a fresh topic for some people listening. And I know that inbound sales is going to be a newer topic for even more folks. The term itself I believe is something that's tied to HubSpot. Correct me if I'm wrong. Can you explain a little bit about what formally inbound sales is, and how did it come to be? I think we just covered maybe a little bit about how it came to be because consumers have changed, right?

13:58 Rachael Plummer: Yep definitely. Yeah, it really is just that process of trying to identify what it is that someone needs. Really putting yourself in their shoes day-to-day. And when you go to that prospect, talking to them around those pain points and trying to help them solve that problem. Qualifying to see if you are a good fit. Not how you are going to be a good fit, not just pushing it on them. Actually figuring out, should we work together, does this even make sense, can we even help you with your problems? Inbound sales is really just going to the people who are ready to talk to you at the right time, rather than constantly interrupting someone's day, like you said Ken. It's identifying those inbound leads first and then expanding your network by talking to maybe some of those colder prospects, but helping them with those pain points and challenges.

14:55 Ken Franzen: Sure, absolutely. Now there are... Everything about HubSpot, you guys do an excellent job of being absolutely thorough and identifying progressions. There's a formal inbound sales methodology that has four different steps, I believe they are: Identify, connect, explore, and advise.

15:26 Rachael Plummer: Yep.

15:27 Ken Franzen: Could you take all our listeners through each one of those and maybe helps paint a picture of what an inbound sales process should look like? And I think that'll be helpful for them to compare against the traditional pitch that they're so accustomed to.

15:44 Rachael Plummer: Yeah, absolutely. Yeah, you're spot on; identify, connect, explore, and advise. This is a sales methodology that HubSpot created that I will say as a disclaimer. Most likely we'll have to adapt it to what makes sense for your business. But for the most part the principles will stay true. What we're saying here is: Let's first identify who's ready to talk to us now. This is stage one. Always, like I just said, always go after those inbound leads first. Any leads that are coming to your website, maybe downloading a form that you... Maybe they connected with you on LinkedIn. Anybody who's more of an inbound lead for you should always be your first opportunity. Because they're doing some research, they're saying... They're raising their hand and saying, "Hey, I'm ready to talk to someone, I just might know what about yet."

16:39 Ken Franzen: Sure.

16:40 Rachael Plummer: And then from there, it's identifying good fits and actually starting to reach out to them to see if the timing is right for them as well. That's kind of that identify stage. From there when we actually connect with someone... We start prospecting and we get them on the phone, maybe we sent them a few emails. We need to make sure that we're getting extremely personalized with our messaging. And that's what's gonna differentiate the old sales process from this new sales process. By painting a picture for someone of, 'I know your day-to-day. I'm talking to people like you every single day in my job, so I know what your pain points are. This is a solution. Here's an example of something you might not have considered yet, here's a tip.' Or just like I said, a positioning statement. Putting yourself in their shoes and explaining, "I know what you're dealing with, here's a challenge that other people have told me about." Sorry, go ahead.

17:40 Ken Franzen: No, I was just gonna ask, this is where having a buyer persona outlined and created would come in really handy, right?

17:48 Rachael Plummer: Yes, thank you for that, absolutely. Before we do any of this, we should absolutely be creating buyer personas and figuring out who it is that we're targeting. Whether you do that with your marketing team and kinda have some alignment there with them, or you do it with your sales team. It's: "Who am I targeting, what does their life look like?" At HubSpot, we jokingly call our marketing person, Marketing Mary. The person that we're most likely going to sell a marketing software to. And we identify everything about her. How much money she probably makes, how many kids she has, what she did before she was in this role. It's really digging deep into who this person is and what they care about so that when you do get on the phone with them, or you are emailing them, you know how to communicate with them.

18:41 Ken Franzen: Absolutely. With Marketing Mary for example, you'd get on the phone with Marketing Mary and you'd have in your mind... And you'd have specific messages, or the emails, or talk tracks, and positioning statements that are specific to her that are gonna resonate better with her than if you were on the phone with a different type of target buyer persona with different goals and objectives, right?

19:16 Rachael Plummer: Yeah, do you want me to give you an example of... At HubSpot, if we were talking to a Mary, what kinds of things we might say to her?

19:23 Ken Franzen: That'd be fantastic.

19:24 Rachael Plummer: Okay. At HubSpot, we're selling a marketing solution to somebody who's either a marketing manager or a director of their marketing team. They probably need some help managing everything in one place. To kinda just get her interest, typically we would send her an email that would give a tip on her website. We might look at her blog and say, "Hey, here's a tip for your blog. It doesn't seem like you're blogging very frequently," or, "You mostly have company news in there." It's basically showing, "Hey, I know what you're doing. You're trying really hard, but here's some really low-hanging fruit opportunities where you could kinda move the needle on what you're doing." And it will be interesting to her because she's normally getting an email that says, "Hey, I'm Rachael from HubSpot. I sell marketing software. Do you wanna talk?" And she ignores it. She deletes it. But this email is just, "Hey, here's a tip. Do you wanna talk about it?"

20:21 Ken Franzen: It's helpful. Helpful to them. Oh absolutely, no, that's great. It's helpful and educational versus a pitch.

20:28 Rachael Plummer: Yep.

20:29 Ken Franzen: That's where you're currently at. You've identified Marketing Mary as someone that is engaged and active and worth pursuing. And then you do the connect stage of the sales process... Or the sales methodology. And you're focusing on... What else do we do in that connect stage. Is there anything else that we can do in that stage there?

21:00 Rachael Plummer: Yeah. I think from your perspective, it's, "Do I wanna set up more time with this person?" But from their perspective, it's getting them interested enough, positioning yourself as a trusted advisor who knows a lot about what their daily life looks like, giving them tips and things like that to gain that trust. And then deciding if you wanna move on to a more in-depth exploratory phase from there. I think the number one rule with the connect phase, which goes against all of our old sales process, is: Do not talk about yourself. It's not really about you. And if they ask maybe you give a 10-second spiel and say, "We'll get into it next time."

21:42 Ken Franzen: You're asking a sales person not to talk about themself?

21:44 Justin Johnson: Right.

[laughter]

21:46 Rachael Plummer: I know. I know.

21:48 Ken Franzen: It does require some discipline, right?

21:52 Rachael Plummer: Yes. I work with many sales folks who have been in the job, in the game for 30 years and asking them to do that has been a challenge.

[chuckle]

22:04 Rachael Plummer: It is hard but you have to make it about the buyer now, otherwise they're gonna move on.

22:09 Ken Franzen: Sure. You made mention... That tip that you gave Marketing Mary, and that was one example. You rattled that off like you've done it a thousand times. How defined do you get in the connect stage with those messages. Do you have a playbook that is geared towards that particular buyer persona?

22:34 Rachael Plummer: Yeah, great question. I think as a sales person you're always kind of focused on your number one thing, which is 'how much time do I have, how much time should I spend on these things?' I think you need to get really, really personalized with the way that you are prospecting someone, but you also need it to be scalable. We can't spend 45 minutes on every outreach. It just wouldn't work.

22:58 Justin Johnson: Right.

23:00 Ken Franzen: Right. No.

23:00 Rachael Plummer: I think it's very important. I typically tell people, "make sure you're continually reaching out, five to seven times to someone." That's what it will take to actually connect with them. And on the level of personalization, it's just a quick email. If you really get lengthy with it, they're not gonna look at it anyway. But it's just one quick tip, "Hey, here's a screenshot from your website. I saw that you're doing this. Looks great. Here's a quick tip. Let me know if you wanna connect."

23:30 Ken Franzen: You said five to seven times to connect with someone?

23:33 Rachael Plummer: Yeah. HubSpot's done a lot of research on this. I think the number might be more like five now but we've always kinda said five to seven to be safe. We'll encourage people to leave a voicemail, send an email. And it can take up to that fifth time to really get them to reply.

23:52 Ken Franzen: Oh wow. 'Cause I would venture to guess that most give up before the fifth time.

24:02 Rachael Plummer: Yep. Great. Great point. That's one of our challenges.

24:07 Ken Franzen: Interesting.

[laughter]

24:09 Rachael Plummer: But yes, I work with a lot of people who send one email. They'll get... Let's say they have someone download a form on their website, they'll send a follow-up, and that's the end of that. Have you guys ever replied to just one email?

24:22 Justin Johnson: No.

24:23 Ken Franzen: No.

[laughter]

24:24 Rachael Plummer: From a salesperson?

24:26 Ken Franzen: There's that frequency, they're that... For now what I do reply to is, oftentimes, is the person who I've never spoken to but I know their name because they've reached out to me so many times.

24:36 Justin Johnson: Right.

24:38 Rachael Plummer: Yep.

24:38 Ken Franzen: That impresses me to the point where I'm gonna get on the phone just so that I can get rid of this person.

24:44 Justin Johnson: Yep. You're a 100% correct.

24:46 Ken Franzen: But I do have a little bit of admiration for their persistence and give them some credit for that alone. Sometimes I might even... Because they do stand out, versus the other folk of... They do stand out from the crowd. And they're much more appreciated than the person that said, "Hey, I've emailed you seven times," which I know you haven't. With a singular email trying to, hey, establish that we have a history. That annoys me, drastically. I got one the other day that it was... They even fabricated a chain of emails and I went back.

25:28 Justin Johnson: "Where are the emails?" [chuckle]

25:28 Ken Franzen: I was like, "Did this person ever send me?" And I did a search in my inbox. This is the first message they've ever sent me. But they had created an entire history of emails that they...

25:38 Rachael Plummer: Oh, my gosh.

25:38 Justin Johnson: That's amazing.

25:39 Ken Franzen: That they sent me.

25:40 Rachael Plummer: That is hilarious.

25:41 Ken Franzen: This is awesome.

25:43 Rachael Plummer: Yeah, I think don't harass someone. We don't wanna send someone 15 emails just because it's a waste of your time as a salesperson. But I think if you're sending helpful, either resources or tips in your communication, and you get up to five, and someone hasn't replied, break up with them and move on. 'Cause clearly if we're really owning that inbound sales process, they're not ready to talk to you, otherwise they would've let you know.

26:15 Ken Franzen: Exactly. And so, with that, I mean, the beginning of this process is identifying who is engaged and who is ready. But I think the item that I found most appealing to this entire process is, as a salesperson, we spend so much time feeling like we gotta chase everything. And this was a breath of fresh air when we say, "No, we're just gonna concentrate on the buyers that are engaged." And we can focus our energies and do a better job, and then determine if we want to work with them as much as they wanna work with us. It was very, very refreshing, for lack of better terms.

27:01 Rachael Plummer: Yeah. That's kind of the explore process, too. We've talked about identify, we've talked about what it looks like when you actually get that person on the phone, how to give them tips, or how to get them to get on the phone. But that explore phase, which is the next phase that we recommend, that's where I really try to encourage people to figure out not just how you can fit into their world, but how they can actually fit into yours. Which I think is what you're saying there, Ken.

27:29 Ken Franzen: Yes. No, that's exactly what... During the explore stage, this is when we actually... We're connecting with them. We're in back and forth communication.

27:41 Rachael Plummer: Yep. This is like, "Hey, I had a quick meeting with you. I decided we might be able to help you." Now we're going to have a more in-depth meeting where we determine things like, what are their actual challenges? Rather than just what we think they are. What does their day-to-day look like? What are their goals as a company? What are their plans to achieve those goals? Are we talking at the right time or are they looking for solutions in 2018? All kinds of things to just dig into if this would be a good fit on both sides of the spectrum.

28:20 Ken Franzen: And this is the opportunity really to dig up all those details that are gonna make you so much more effective throughout the rest of the process.

28:31 Rachael Plummer: Yep. Yeah, exactly. I try to... It's interesting, in your world, 'cause you guys come from an agency background... And I'm thinking, too, if I were running a software company or if I were a manufacturing company, it all stays true. You wanna find the right solution for that person. If you want to do that, you need to know details. What is it that really keeps them up at night? What are the consequences of not hitting their goal as a business? What would it enable them to do if they did hit their goal as a business? Really digging into everything you need to know so that you're providing the best possible solution for them.

29:15 Ken Franzen: And they just pour this all out with no effort?

[laughter]

29:19 Justin Johnson: Wrong.

29:19 Rachael Plummer: Yes, every prospect is completely agreeable. They will tell you everything that you wanna hear.

29:26 Ken Franzen: Beautiful. That sounds so easy.

[chuckle]

29:29 Rachael Plummer: No, actually you bring up a really good point. People don't always focus on that. It can be challenging as a salesperson now because people do have all of the information they need. They're sometimes difficult. They're not gonna lay it all out there for you and they're gonna give you a hard time about asking them questions, they're gonna want you to pitch. They act like they don't but then they ask you to pitch. "Just tell us what you can do, we don't need to be on the phone for more than five minutes because I have everything I need on the internet."

30:02 Rachael Plummer: But I think you bring up a good point 'cause that is why we give tips and we use positioning statements. We put ourself in their shoes so that they will trust us. So we can ask questions. At HubSpot we kinda say, "give them a tip and ask a question. Give them a tip, ask a question." Like, "Hey, your blog, I notice you're doing XYZ, this looks great. Have you thought about doing this? Can I ask you a quick question about that actually?" And then people will usually open up. It's definitely a balancing act and it can be challenging depending on who you're talking to.

30:38 Ken Franzen: Okay, so what about the... 'Cause when we get into a supposition of this nature and there's some back and forth. The begging, the nagging question that's on the buyer's mind the entire time is, "Okay, how much is this gonna cost me? How much is this gonna cost me? All these things sound fancy and expensive and I know that we're going through this process and... " When they just... We're in the explore phase right now and our objective here is to uncover challenges and goals and learn more about, how do you combat, "Just send me a proposal right now." Would you send them that proposal now? What do you do in that instance?

31:22 Rachael Plummer: Yeah. Two questions. One is, if they're just asking you about pricing, if they are like, "Tell me how much this is gonna cost." I think you kinda be transparent with people. I think you give them a range of what you expect it to cost, because at the end of the day you don't want to waste your time either. But I think you're very clear that you're at the beginning stages here and you need to learn a lot more about their business before you can actually identify what it's going to cost. I think giving a range is a good idea just to make sure that everyone's on the same page, but not getting too specific until you know more about their business so you can actually tell them the pricing.

32:06 Rachael Plummer: In the proposal world, where you guys... You're at an agency, they're gonna ask, "Give me that proposal, just outline what you can do for me." I would say, "I can't send you a proposal at this point, I don't know enough about your business. Here's all the things that I'm still trying to learn." And kind of back up and say, "Look, when we work with people we're looking for a partnership. We wanna make sure that this is a good fit not just for you, but also for us. We're picky about who we work with." Kind of putting yourself back in control, whether that's true or not, I think it gives people... It shows them that you care and gives them a little bit of respect for your process.

32:50 Ken Franzen: Absolutely. No, I like that because we get... And I say we, I think that I speak for most businesses out there, we get so many phone calls, "Cool, can you send me over a price for XYZ?" Unless you are the cheapest... Your positioning is the less expensive option, that's not the advantageous selling position to be in, right?

33:19 Rachael Plummer: Right.

33:20 Ken Franzen: Yeah, the ability to hold back and learn more and better align yourself. The explore stage we learned everything, we're digested. Now this is a point where we determine, "Hey, do we move forward or not?" What's that decision look like as far as and the conversation look like with the client or the prospect?

33:47 Rachael Plummer: Yeah. Whenever I'm running an exploratory meeting, I wanna make sure that I've really honed in on how I can help them, that's things like their challenges, their goals, their plans. Is this timeline accurate? Are we on the same timeline? Is this going to happen within the next month? If not, I'm not gonna move on with this conversation. Do I have the right person on the phone, or in person? It's speaking with the person of authority, the one who can make decisions. And have I budget qualified them? Like you said, they're gonna ask about it. It helps I think even if they haven't asked for it at the end of that meeting to at least give a range so that everyone is on the same page. If all of those things check out, I think it makes sense to move forward with an advising meeting where you're actually recommending solutions for them. If not, I think it's perfectly appropriate to provide people with resources and say that you will talk when the timing is right.

34:48 Ken Franzen: Just to back up, you would actually, if they hadn't talked about price at all, you would bring up budget or price at this point?

34:54 Rachael Plummer: At the end of that meeting, I would absolutely give a range. Just to make sure that you're on the same page. Because if we're moving someone to an advise stage here, which is the last step with this process, there's some work on the end of the sales rep to actually put together either a presentation, or a proposal in your case, or just kind of align solutions with what makes sense for them. And that's gonna take time. And again, all we have is time in this job, so we don't wanna waste it.

35:25 Ken Franzen: Right.

35:26 Justin Johnson: Sure.

35:26 Ken Franzen: Valuable resource everyone's trying to save, right?

35:30 Rachael Plummer: Yeah.

35:31 Ken Franzen: Awesome. Then you mentioned the final stage is advise. Considering that everything's peachy and we're all holding hands and skipping down the yellow brick road together, we're gonna then take this next step into... With the prospective buyer into the advise stage.

35:53 Rachael Plummer: Yep. If you have someone who came to you who asked for a proposal in your first conversation. And you did everything right, you took a step back, you forced them to go through this lengthy sales process with you to really dig in to their needs. And then you just give them some sort of canned presentation. Things are not gonna go over well. [chuckle]

36:19 Justin Johnson: No.

[laughter]

36:21 Rachael Plummer: I think part of the advise stage is, you've just taken someone through this whole process, you've learned so much about them, it should be pretty easy to put together some sort of customized... Like I said, presentation, proposal, solution for them. But at the same time, you're also selling here. You're closing the sale. You do wanna just get really personalized with it anyway, and customize it to everything that you've learned about them. Pick what makes the most sense and present on that.

36:51 Ken Franzen: The clear-cut goal is that this is where we're going in for the kill. We're trying to close them down with this step of the process, right?

37:01 Rachael Plummer: Yeah. And hopefully... If you've really taken them through a thorough process. Hopefully going into this, they kind of already know they're gonna be working with you. You kind of already know they're gonna be working with you. But this is just the last step to make sure that everyone's on the same page. "Hey, for everything that we talked about, here's the solution that makes the most sense for you." I can give you an example: At HubSpot we take people through this process and our last step would be showing a software demo, 'how can this work for you?' We have over 30 tools now in the platform between marketing and sales, I could never show everybody... Someone all of the tools in one of those meetings. It wouldn't be possible. It would take hours and hours and hours. I need to take everything I learned in that explorer stage and figure out, out of the 30, which five to seven tools make the most sense to show someone based on their business needs? Where can I provide business value and give the most context for what they're looking for here?

38:06 Ken Franzen: Sure. Now, how do you proceed in going... How do you start off that call? Is there a... I think at one point in time, we had discussed some ways that you can tell or even back out of the call if you can hint that maybe they're not quite ready, or there's an objection that was looming we didn't quite know. Could you talk a little bit about that?

38:35 Rachael Plummer: Yeah. Are you asking, we're going into the final step and at the beginning they present an objection? Or...

38:43 Ken Franzen: That or you feel that maybe... You finished the explorer call and everything's looking fine and you are... You have your proposals created based on all the current knowledge you have. But as you enter in, maybe there's a sense of hesitation or... 'Cause you've taught us kinda to do a bit of a check down to make sure and recap, nothing's changed, so on and so forth. In the event that you aren't exactly completely positive on the budget or their authority of what... How can you go about proceeding with that or what would you do? Would you back out of that call? Would you still proceed without knowing? And I guess what I'm getting at is, certainty. At this point, and you had mentioned earlier, everyone kinda pretty much knows they're gonna be working with one another. And this is more of a formality to finalize the details, right? It's like the closing on a house. But if you had a suspicion that you weren't as confident as you normally feel you should be, would you still proceed with the advise stage or would you back up and try to realign the pieces so that you got to that comfort level?

40:04 Rachael Plummer: Yeah, great question. I absolutely think you wanna back up. At the end of the day, all we have is our gut. We can use a framework, but your gut is going to tell you what's going on. I also think it depends on what you're selling here. You as an agency, you're selling a bit more of... It's a customizable product. You need to customize it to what their needs are, moreso than I would with software. And you have a higher sales price, you guys probably need a bit more of an in-depth sales process. I would say for an agency, you're probably gonna need to add a step in-between explore and advise, just to really make sure everybody's on the same page. And you're building out the different types of services that make sense for them.

40:56 Rachael Plummer: For, let's say, a manufacturing company or a software company, you're probably gonna be able to move from identify to connect to explorer to advise without much in-between. But you're spot on. If you think there's things missing or you didn't quite get there, it's either in this advise stage, spend the first half of it just really digging into what you might've missed or recapping just to confirm that, "Hey, what they said last time is how they truly feel." 'Cause sometimes people lie in the sales process. [chuckle]

41:29 Ken Franzen: No.

41:30 Rachael Plummer: "Hey, our pricing's this to this." "Yeah, that should be fine." Next call, "We could never afford that." [chuckle]

[laughter]

41:39 Rachael Plummer: Yeah. I think it's important to recap and make sure, "Hey, I just want to make sure I heard you correctly. These are the things you told me." Or like you said, add a step if you need to, if there's things missing.

41:52 Ken Franzen: Sure. Sure. Alright, then we proceed through the advise stage and everything goes as planned, we present them our customized proposed solution. And then what? What's our next step here?

42:13 Rachael Plummer: They give you their money, and they're really happy.

[laughter]

42:17 Ken Franzen: There we go. Alright. We've went from the presentation to the actual close. And, is there anything...

[laughter]

42:24 Rachael Plummer: Okay, I'm just messing with you, but yeah.

[laughter]

42:28 Rachael Plummer: That advise stage is where we're presenting closing it out, getting a hard verbal. And hopefully, creating a very happy customer.

42:39 Ken Franzen: Absolutely. Perfect. Now, what about... And sometimes, we have to present to an individual that is an influencer, but isn't the complete authority. And I'm speaking of instances where someone has to take what you've talked about and present to a board of directors.

43:05 Rachael Plummer: Yeah, I love this.

43:07 Ken Franzen: And so, how do you go about that?

[chuckle]

43:11 Ken Franzen: Because now, you've taken... And you've done your best to excite, and dig into and... With the exploratory call. And uncover all the goals and challenges. And then you advise and you present this customized solution that, you're saying, "Hey, here's what I want you to go sell for me to a whole room of people."

43:37 Rachael Plummer: Yep.

43:38 Ken Franzen: That's gotta be easy, right?

[chuckle]

43:41 Rachael Plummer: Oh, yeah, super easy. [chuckle] No, I love this. I think it's a really, really important thing to bring up. 'Cause this happens all the time. You have an influencer on the phone, and a lot of times people don't even know that they're talking to an influencer. And they go through this whole process, they get to advise, they go through it, and then they say, "Alright, well, our meeting with our board of directors is at the end of next month, so we'll get back... "

44:06 Ken Franzen: Board of directors.

44:07 Justin Johnson: "We don't know yet... "

[chuckle]

44:10 Rachael Plummer: I think there's a few ways to approach it. One, this is why the explorer stage is so important, to figure out who are you talking to, and what does their decision making process look like? Who is the person signing the cheques? That's what we need to determine very early on in the process. And in a perfect world, when we figure out we're talking to an influencer, we do everything we can to get the decision maker on the phone. It's not always gonna happen, though. That's a perfect world. And I think, also, sometimes, although they're an influencer, they do actually, really, heavily influence the decision maker. We don't wanna ignore this person. And if there's a lot of pushback to getting the board, or whoever signs the checks, on the phone, then we need to figure out a way to help them... Basically, to convince them to love us and, then, help them to sell us to their board.

45:10 Rachael Plummer: I think the first step is just, once you figure out that's your scenario, it's adjusting your sales process a little bit, taking a step back, and figuring out how you can sell that person on how you can make their day so much better. Because they could easily block you, too. You wanna convince them that you are gonna help them so much. Once you kinda get them sold on you, then... Maybe it's creating almost an extra advise phase where you're building out the plan together. Don't leave them with the 10 seconds of memory they have on your hour presentation to go pitch to their team. Actually help them build out the presentation. Provide them with resources. Ask them what the decision makers care about. How have they purchased things in the past? Just make sure that it's transparent and you're fully helping them to really sell you guys in the way that you would, if you had the opportunity to do that.

46:14 Ken Franzen: Almost get them beside you in the process of creating the presentation?

46:21 Justin Johnson: Yeah, we call that... Whenever we have an influencer, that we're kind of forced to take through the sales process, we call them our champion. "This is your internal champion. You need to make this person look amazing. And, also, have everything that they need to present the solution that's gonna help them." What I love about influencers is, oftentimes, it's actually pretty easy to convince them that you're the best fit for them, if you are. The hard part, like you said, is then going to the team and presenting. So make them your champion. Help them figure out what that team cares about. And then give them everything they need to crush it.

46:56 Justin Johnson: Good point.

46:57 Ken Franzen: Sure. And I'd have to think that taking this approach wouldn't be... It would be the exception rather than the norm. If you are in a competitive situation being evaluated against another competitor, and they're kinda just emailing over their slide deck with the numbers on it, and you're taking this extra care and time... I'd suspect you'd get the nod from the influencer, and also them being a little bit more influential... I need more coffee this morning.

[laughter]

47:40 Ken Franzen: In that process of trying to persuade the board which route to go. And I could think that this would be more advantageous, in the event that you might not be the cheapest option, which we all know, boards have a tendency to look at.

47:54 Rachael Plummer: Yeah. Put yourself in that influencer's shoes. They want something to help them. They probably have the most pain out of everyone. And they've gone to their boss and they've said, "We need something to make this better." And their boss says, "Great, create an entire presentation on why we can help you make your job easier." And they're just like, "Ugh, come on."

48:17 Justin Johnson: That's sounds like fun.

48:19 Ken Franzen: Right.

48:20 Rachael Plummer: Right. If you're coming in there and you're saying, "First let me figure out what is that really affects you day-to-day. Then I'm gonna suggest what's gonna make it so much better, and then I'm gonna actually do your job for you and put together a presentation and help you present to your team." They're gonna love you.

48:36 Justin Johnson:

48:36 Ken Franzen: Absolutely. That sounds awesome.

[chuckle]

48:42 Rachael Plummer: I mean, perfect world, right?

48:44 Ken Franzen: Perfect world, absolutely, absolutely.

48:46 Rachael Plummer: No, but you brought up a great competitor point as well, I think... Not that HubSpot's the end all be all. But whenever we do get feedback in a situation like that where we've brought on a new customer, they'll typically say, "Nobody tried to bring us through such a consultative, thoughtful process, and that's why we chose you. Even though you are more expensive."

49:09 Ken Franzen: Awesome. And that's really a nod to the process itself because... Again, I go back to... And I talk to this a lot with our clients and tell them. And most of them aren't the most affordable option. They're at a point where they're mid to high range, and in order to win you have to be perceived more valuable. Even if you are more valuable, you have to be perceived as more valuable in that buyer cycle.

49:45 Rachael Plummer: Yep.

49:46 Ken Franzen: Alright. You just took us through an awesome step-by-step process of the inbound sales methodology. And I know a lot of people are excited and eager to look at what they can do, what are some actionable things that listeners could do today to kinda steer them towards getting their sales efforts aligned with inbound sales?

50:16 Rachael Plummer: Yeah. I think there's a few things you can do. Just stop pitching. [chuckle] Stop pitching people. Put yourself in your buyer persona shoes, give helpful tips, actually think about what keeps them up at night, and be helpful. Nobody wants to talk to a salesperson, they wanna talk to a consultant, someone who's helping them. I would say that's number one, change your process now because it's antiquated. Number two, go get inbound sales certified. Ken will send you a link, but we have a free inbound sales certification at HubSpot. All the steps that we just walked through, no strings attached, truly. You can just go get your certification. There's a bunch of resources for every stage, there's guides that will walk you through how to do it, what questions to ask and it can be really helpful. I'd say go do that.

51:16 Ken Franzen: And that's videos, right Rachael? It's...

51:18 Rachael Plummer: Yep, yeah, great point. It's a series of videos and then there's resources and guides attached.

51:25 Ken Franzen: Alright, 'cause yeah, I'd recently... We bought a drone here at the office and I'm trying to get my license so I can fly it.

[chuckle]

51:34 Ken Franzen: And be...

51:34 Rachael Plummer: You have to have a license?

51:34 Justin Johnson: You do.

51:36 Ken Franzen: Yeah, there's actually a... You need to be licensed. It's funny because... I don't mean to go off on the left-hand turn here, but they actually go so far to identify what is considered a flying object and what you need a license for, not as by weight. And they even make reference to things like Frisbees. They're like, "Do I need some license to... " There's probably some smart ass out there who'll be like, "Oh great, now I need a license to fly my frisbee." And they're like, "No, you don't, because it's less than this much weight." But the point I'm making is that training is a boring stereo manual of just words and I'm like, "Oh my gosh, I don't even wanna go through this." Where, the videos that are in the certifications with HubSpot... And there's more than just sales, you have lots of certifications and that anyone can go through and learn more about inbound marketing, inbound sales, email, all kinds of fun stuff. But the videos are great, they're well put together, they have supporting documentation and resources and we'll include a link to that in the show-notes for everyone.

52:38 Rachael Plummer: Perfect. Yeah, videos are easier for me to stomach as well, I have an attention span of, "Hey, a gold fish!"

52:46 Ken Franzen: A gold fish.

[laughter]

52:51 Rachael Plummer: Love it. Alright, stop pitching, go get inbound certified. I would also say use a CRM, there's plenty of free platforms out there, we have one as well that Ken and Justin can send out a link too. You just need to keep track of how you're talking to these people, when you're talking to them, what you're talking about, and who they are. And I think when we're using things like Spreadsheets we lose track of that. I think it's really, really important to make sure that you're digging into that side as well.

53:25 Ken Franzen: And there's some nice automation to... Especially with the HubSpot CRM. And it helps with some of those pains that a lot of sales people have with that data entry part.

53:40 Rachael Plummer: Yep, Yep.

53:41 Justin Johnson: And so there's some really cool features there that will eliminate the need for a lot of that data entry and make your lives much easier. And I have to say that I have introduced CRMs to several clients who were using the Excel spreadsheet format and reluctantly they begin to make change. No one likes change. And they did the change, and once they got there, they were pleasantly surprised in how much benefit they got out of the actual CRM itself. And so, definitely we'll include a link to that as well for everyone in the show notes.

54:21 Rachael Plummer: Perfect. I would say one more thing too as an action item. I think... We didn't talk too much about this today, but we call it Smarketing over here at HubSpot. And it's sales and marketing alignment. I think it's incredibly important to work with your marketing team. Not just from how to build out buyer personas like we talked about, but how are they messaging to these prospects? How are they attracting people to your site? Make sure everybody's on the same page and when they are generating leads, are they the right kinds of leads for your sales team? There's all kinds of things that you can do with Smarketing and I just think it's extremely important to get those two teams really loving each other rather than butting heads. Which is the historical side of sales and marketing, I think.

55:10 Ken Franzen: Well, absolutely, and I think sales provide so much insight to marketers and I don't think that's often leveraged much.

55:18 Rachael Plummer: Yep, yep.

55:18 Ken Franzen: Because the sales people are in the trenches with the people, exactly. I'm glad you brought that up. Yeah, Smarketing is something that's definitely important and we'll touch on a link or two that we can find for folks so that they can go learn a little bit more Smarketing as well.

55:41 Rachael Plummer: Yep.

55:42 Ken Franzen: Rachael.

55:42 Rachael Plummer: I think too if you're generating leads that aren't helping the sales team, what is your point as a marketer, right?

55:49 Ken Franzen: Right, well, it does. It defeats the entire purpose because if you're producing leads that aren't converting into customers or... They're bad leads, then the whole process is pointless, right?

56:03 Rachael Plummer: Yep, yep. Exactly.

56:05 Ken Franzen: Perfect. Rachael I have to ask, because you brought up Smarketing. Is there anything else that maybe we didn't touch on today that you think that we should shed some light, any more nuggets of wisdom that you can whip out for us to digest?

56:24 Rachael Plummer: Yeah. In relation to inbound selling or just a whole new topic?

56:32 Ken Franzen: If you wanna talk about [chuckle] anything in general.

[laughter]

56:38 Ken Franzen: I wanted just to make sure that we didn't leave any loose ends there in regards to inbound selling. We can talk offline about another topic that you can shed some light on and perhaps, we will talk about how to survive subzero temperatures in the northeast.

[laughter]

56:55 Rachael Plummer: Yes. It is exactly zero degrees here in the northeast today. No, I think we covered it on inbound selling. I think the wrap up from me would just be for all of our old sales folks... Not to say that they're old. But people who have been in the game for a long time, I know inbound selling is intimidating, it's scary, it's a whole new way. But I'm telling you, the world has changed, everybody's moving to this. And I think in my life, the only people who can hard-sell me now are the car salesmen.

57:29 Ken Franzen: Yeah.

57:30 Rachael Plummer: It's really, really important to adapt, stay relevant, and actually be helpful.

57:35 Ken Franzen: Perfect.

57:36 Justin Johnson: Cool. Alright. Well, I think that covers everything up today. Thanks again for coming on Rachael, we truly appreciate it. We have the show notes available at www.neongoldfish.com/podcast. Until next time, this is Justin and Ken with Neon Noise. Make it a great day.

[music]