PROCESS FRAMEWORK

Prospect Placer Qualification State of Change CDJ: Customer Decision Journey Defined Symptoms Sounds Like **Enabling Processes** Facilitates movement along CDJ

Does the prospect's **Needs** fit your company's **Expertise**? Do you know who all the YES **Decision Makers** and **Influencers** are in this change (buying) process? NO Does the prospect have a Time slot in YES mind? (If six months, then YES) NO YES N₀ Are resources Are resources (Money/People) dedicated? (Money/People) dedicated? N0 YES NO YES Stage 1 Stage 2 Stage 3 Stage 4 **UNAWARE CONTEMPLATION PREPARATION ACTION**

No intention of trying something new Not changing vendor, process, people In denial

> Defensive Demoralized Unaware Hopeless

Uninformed

Content

Unaware of the problem

"Don't see any problems." "Not interested." "I have help." "Happy"

Aware that a problem exists. Contemplating a change. Admitting they need help.

Talks about past. Focuses on problem. Seeking information. Reevaluating current state of change. Assessing pros and cons. Stalled is possible. Making inquires.

"I feel stuck." "Interesting."

"Hmmmm."

future (six months). Delving into specifics of need. Have seen shift in the prospect.

Intends to take action in the near

Talks about the future. Focus on selection. Intends to act within six months, most within 30 days. Setting goals. Developing a detailed plan.

"I'm interested." "Not quite ready yet." Exhibiting action (note behavioral change has not happened).

Delving into specifics of solution, working with you. Budget/assigned.

Resources set. Active problem-solving (see change in thinking, emotion, awareness). See ownership of section.

"Give me a proposal." "Tell me what this would look like."

EXCHANGE The deal is done. The client thinks you consistently

Approved a verbal proposal, signed a written contract, and payment received. Expectations outlined. Relying on you.

Stage 5

P.O. or cash has exchanged.

"Where do I sign?"

"Here is the P.O."

Receive an unsolicited referral through a client. Repurchases exclusively from vou. Only deals with you.

Stage 6

ADVOCACY

meet and surpass expectations.

is my sole provider." "I won't work with anyone else." is our 'go to.'

A. CONSCIOUSNESS RAISING/INTERNAL ENLIGHTENMENT Speaking Social media

- SEO/PPC digital search-SEO
- Advertising
- Speaking-hospitality-writing/trade shows Public relations/news articles
- Industry awards Direct Referral · Blog content
- B. INFLUENCE-SOCIAL LIBERATION/EXTERNAL FORCES
- Regulatory (environment regulation)
- Workplace change (paper to digital) • Industry leadership shift
- · Competitive challenge to status quo
- Cultural shift (GMO to heritage foods)
- Marketplace shift of preference (ethos of millennials)
- Procurement change (personal to GPO)

ENABLING ADVOCACY

- Self image transfer/brand association and identification
- Healthy results/scorecard metrics and communication of value
- Attitude transfer/professional education and principle adoption
- E+P=stage 6/product-service process and customer service codification
- Advocacy is never guaranteed

C. EMOTIONAL AROUSAL

- Digital conversion/CTA-offers
- Webinar Case writing
- · How-to
- E-book
- · Web-presence/site to social, including 3rd party
- Self-guided needs assessment (about their needs not yours)
- Web Video
- Product/service review
- Customer- facing process offerings (video-telephone-WebEx)
- · Case studies/high level and inspirational testimonials

D. RATIONAL REEVALUATION/WHAT-IF ENVISIONING

- Calculators
- Inspirational case study and testimonials
- Needs-assessment offering (tele-WebEx or face-to-face)
- ROI before/after case studies
- Data and other analysis offerings
- Web: product offering presentation
- Product/service review
- · Need and financial fit frameworks • Demo video

E. COMMITMENT/PRIVATE AND THEN PUBLIC

- Personal reassurance tools to
- Reference communications
- Exchange-based (paid or cash free) diagnostic offerings
- Detailed process based case study
- · Internal advocacy development
- iPad/mobile apps with calculators
- Full DM team meeting
- Deep testimonial and expertise tools in video, print, and digital
- Pilot (test) project (initial ROI Report)

F. HELPING RELATIONSHIPS

- Testimonials/client interviews
- Influencer assistance/inside sales people and tools
- Listening and input tools Internal team/offering early access
- to client experience
- Consultative selling tools
- G. POSITIVE SUBSTITUTION/COUNTERING
- Change in process Pilot projects
- H. ENVIRONMENTAL CONTROL
- Process surrounds
- Off site: neutral and fun
- Working meals
- I. REWARD FOR POSITIVE BEHAVIOR
- Verbal praise and encouragement
- · Celebration: lunch or dinner

- Budgeting and proposal
- assistance
- External reward: ROI/savings
- Self reward: if you budget x then you can get y "which you want to do but could not yet take"

Paid diagnostics with initial ROI projections

- Office/plant visit-planned customer experience design
- Gifts: nominal value such as a book or tickets

