

How to Become a Trusted Advisor

Using your head and heart





Contents

- 3 The Truth About Selling
- 4 Finding Balance
- 5 Lead With the Heart and Make a Connection
- 6 3 Modes of Empathetic Listening to Drive Sales
- 7 The Trust Triangle
- 8 Why Authenticity Matters
- 9 Use Your (Own)Head
- 10 Framework for Discovery Calls
- 11 Immerse Yourself in Your Client's World
- 12 Industry Trends – Sales Research
- 13 It's All About A Growth Mindset With the Customer at Heart

The Truth About Selling

Effective selling doesn't require supernatural persuasion skills or deception to win a customer for life. It's not about pushing products that customers never asked for. It's about creating value.

True salespeople feel the joy of fulfilling a need and making customers happy. The most successful selling practice nurtures values that are the exact opposite of the used-car-salesmen stereotype.



Finding Balance

HEART

Connection

Authenticity

Empathetic Listening



HEAD

The Discovery Interview

The Client's World

The Research



Lead with the Heart and Make a Connection

Make personal human connections with prospects.



Practice Empathetic Listening

- Listen to what is being said between the words.
- Become more attuned to your client's pain points.



Be Trustworthy

- Enter a business relationship with a caring attitude.
- Invest your energy, effort, and empathy.
- Be ethical & transparent.
- Share expertise, knowledge, and experience.

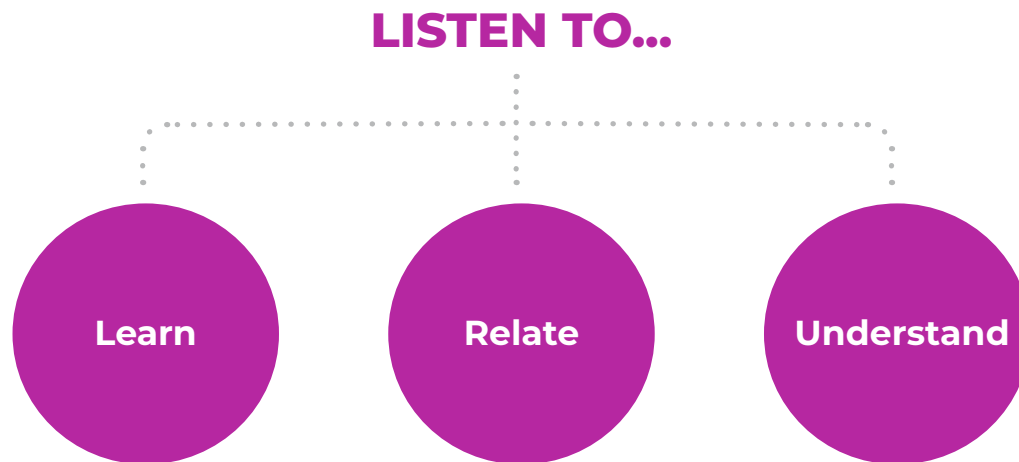


Be Authentic

- Sell what is aligned with your values.
- Believe in your company's values. Give a damn. Trust yourself and your gut.



3 Modes of Empathetic Listening to Drive Sales



With empathetic listening, you're not waiting for your turn to speak. You're gaining intel and building rapport and trust. Your goal is to fully comprehend what your clients are saying, try to put yourself in their position, and internalize their reality.

You'll be able to meet your client where they are and earn their respect.



The Trust Triangle

Create meaningful connections by incorporating The Trust Triangle into your client communications.

The driving factors behind trust are authenticity, logic, and empathy. The success of your client relationship is dependent on these three elements.

Authenticity

I experience the real you. Be yourself as you interact with clients. Success results from the willingness to let your true self shine through.

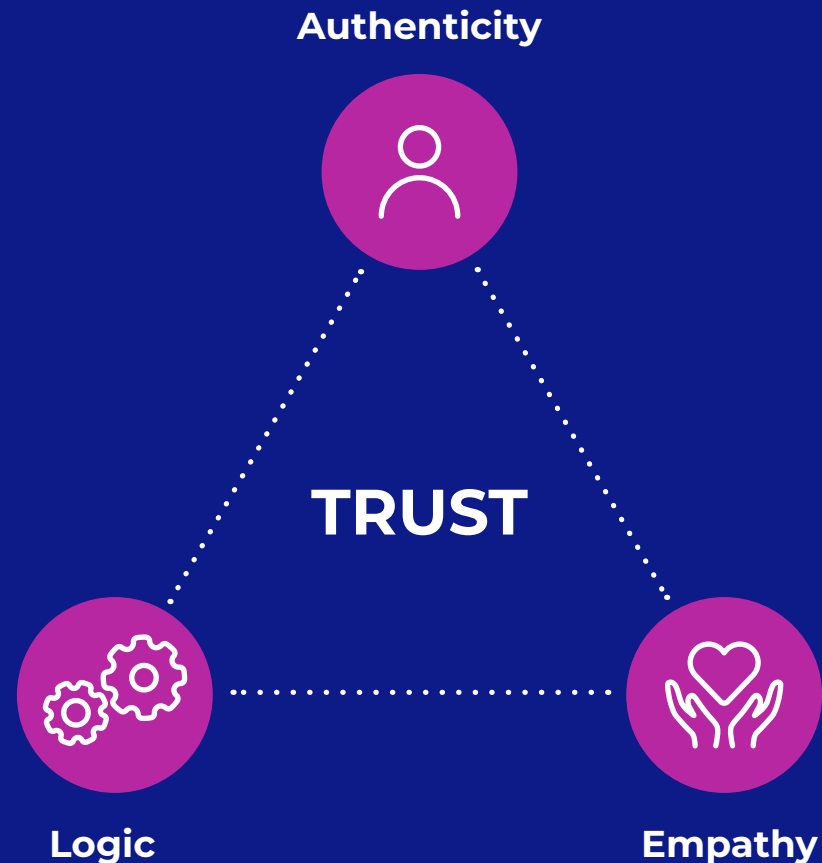
Logic

I know you can do it; your reasoning and judgment are sound. Demonstrate your expertise in areas relevant to your client as you offer solutions to their business needs.

Empathy

I believe you care about me and my success. Investment in your client's success demonstrates sincerity and the desire to actively participate in growing their business.

From: "Begin with Trust," by Frances Frei and Anne Morriss, May-June 2020



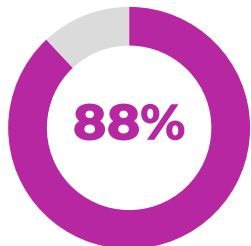


Why Authenticity Matters

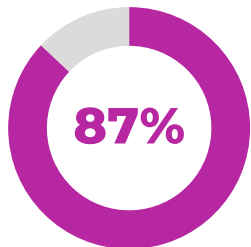
Being a trusted advisor in sales means going beyond typical selling to develop a relationship of trust, credibility, and expertise with clients.

A trusted advisor is a valuable resource and consultant to their clients. They provide guidance and advice throughout the sales process and beyond.

CONSUMER EXPECTATIONS BY THE NUMBERS



of consumers buy only when they see a salesperson as a trusted advisor.¹



of B2B buyers expect sellers to show up as trusted advisors.²

¹ 2020 Global State of Sales, LinkedIn

² State of Sales report, Salesforce, 2023

“Clients want to work with a partner, not just another vendor. Someone who is genuinely on their side, will help solve their current problem and be a resource for future pains. Transactional selling is not building trust.”

– Derrick Jenkins,
Head of Marketing
@Owler





Use Your (Own) Head

To stand out is to be unique. That's why only basic knowledge and expertise around a product or service is not enough. Buyers will notice if you take that information to the next level and create a unique point of view (POV). That takes a lot of research and asking the right questions.



Discovery Interview

- What's said or reported during the discovery interview
- Financial and operational objectives
- Long and short term goals
- Consider the 4 Fs: First, Finest, Failure & Future



Immerse Yourself in Your Client's World

- Insights and intelligence from your client research (form 10K, value line, and CEO letter)



Industry Trends

- Benchmark data against competitors, peers, and other industry trends:
- Environment (post-pandemic, economic headwinds)
 - Trends/competitors
 - Consumer demands



Framework for Discovery Calls:

Ask powerful questions during your calls to get to know your client.

FIRST?

Everyone has a “First” experience: First day on the job. First day launching a new technology. First day of the new quarter. First day with a new team. You can use this to segue into a discussion about similar firsts for you. Now you’re building a rapport, acknowledging similarities and earning their trust.

FINEST?

We all have things we do well and are proud of, so share your wins and ask about their wins.

FAILURE?

We all have growth opportunities and wish to do something better — always reposition “failure” as a positive. Ask, what could you do better or where you have a chance for growth?

FUTURE?

Growth begins with visions and goals, so always ask about future plans. Sales success comes from helping clients realize and communicate their dreams, possibilities and solutions. Ask: What does good look like? This will allow you to think about how your solution will make their future look good.





Immerse Yourself In Your Client's World



Invest time into learning about your client ahead of your meeting and outreach.

Try to learn their business, industry, priorities, goals. (What you don't know, ask – but show you've tried to learn about them).

Utilize words, numbers, and relationships to see impact.

The Words

Examine documents for themes, patterns, or movements.

Documents could include:

- Analyst reports
- Leadership presentations
- CEO letters
- Firmographic data on Owler
- Annual reports
- Form 10-K SEC
- Proxy statements
- Quarterly earnings calls



Industry Trends – Sales Research

To expand your industry knowledge, become familiar with analyst reports and market trends that will influence your client and their decisions.



Valueline.com provides accurate and insightful analyst reports and research on companies and industries.



Tools like Owler Max empower you to stay current on trends, news, and insights affecting your prospects and key accounts.

Benchmark your findings against competitors and peers.

It's All About A Growth Mindset with the Customer at Heart

1. Cultivate Empathy

Encourage your sales team to develop empathy by actively listening to customers, understanding their needs, and showing genuine care. Empathy allows them to establish rapport, build trust, and provide tailored solutions that truly address customer concerns.

2. Promote Subject Matter Expertise

Encourage your team to become subject matter experts in your industry. This can be achieved through ongoing training, knowledge-sharing sessions, and staying up-to-date with industry trends. By immersing themselves in the clients' world and conducting competitive and industry research, they can offer valuable insights and position themselves as trusted advisors.

3. Foster Relationship Building

Emphasize the importance of building long-term relationships with customers. Encourage your team to focus on building connections beyond the immediate sale by maintaining regular contact, providing post-sale support, and proactively addressing any concerns. By fostering strong relationships, your team can become trusted advisors and be top-of-mind when customers require further assistance or make future purchasing decisions.



How to Become a Trusted Advisor: Using Your Head and Heart by Owler & Cherilynn Castleman

Contributors

Owler – A Meltwater Offering would like to thank Cherilynn Castleman for providing valuable insights as we collaborated on this e-book.

About Cherilynn Castleman

Cherilynn Castleman is a Fortune 500 Global Sales Executive/ Coach and empowering advocate for women in business who offers invaluable insights to transform sellers into trusted advisors. Contact Cherilynn to elevate your sales strategies and unlock your team's potential as trusted advisors.

Thank You

We would like to thank our readers and the Owler community for your commitment to succeeding in sales, marketing and more. We hope you're inspired to become a trusted advisor as you inspire us to create even more meaningful content.

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