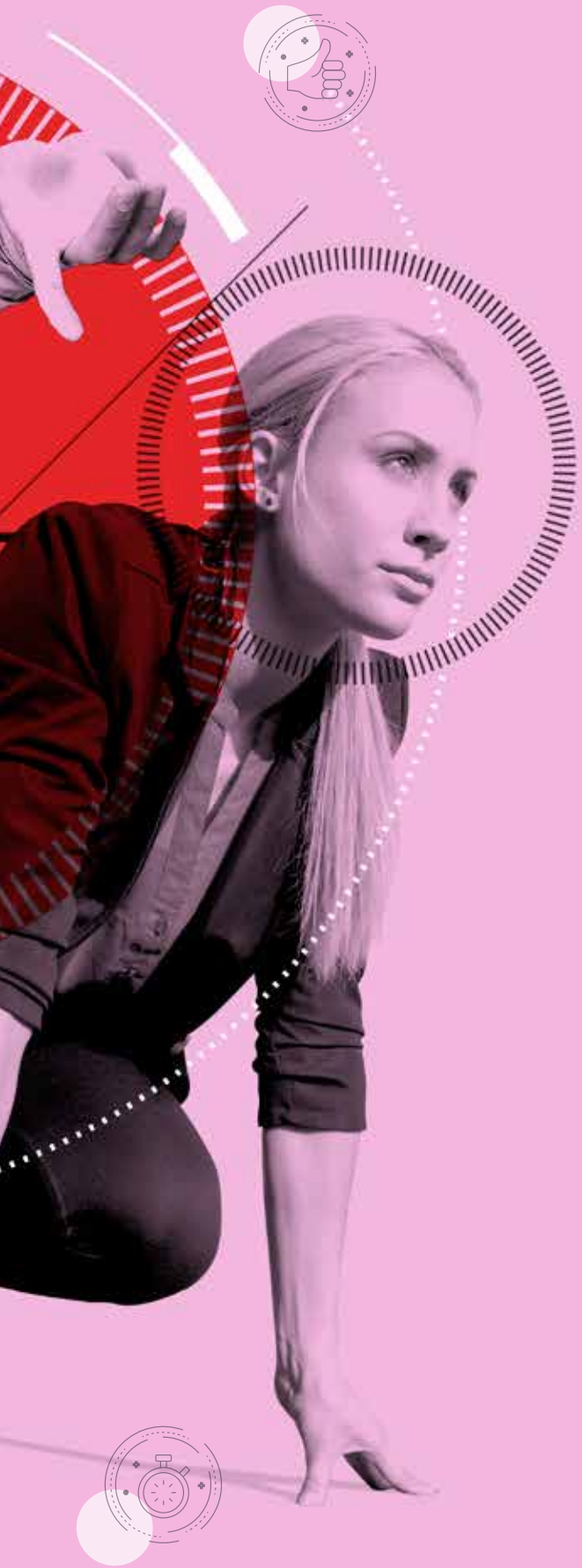


At The Top Of Their Game

Proven sales tips and techniques from 11 of the industry's most productive salespeople

by Tina Berres Filipski

When the housing bubble burst in late 2007 it led to the worst recession since the 1930s. Among the countless casualties was Kimble Bosworth's job with a large online distributor. Instead of wringing her hands, she took stock of her strengths and decided to launch a marketing company with her husband, Chris. With a strong background in sales, the pair looked at what other distributors were doing wrong and came up with a marketing plan that addressed what they thought the industry was missing. The plan focused on what customers could do to promote their brands without a lot of cost—since the recession was in full swing—and it provided an essential one-stop shop from program design to delivery.

In the decade since, growth at Proforma Printelligence in Nashville, Tennessee, has exploded—consistently qualifying Bosworth for inclusion in Proforma's Million Dollar Club.

When salespeople are steadily at the top of their game, it's not a run of luck or a game of chance. Exceptional salespeople know what repeated behaviors and actions are most critical to their success—and they practice and hone them at every opportunity. Conversations with some of the industry's top salespeople revealed eight common elements that, when practiced consistently, propelled them to the top of the sales chart—and then some. Not surprisingly, it all begins with attitude.

1 Maintain An Optimistic Attitude.

Kimble Bosworth
President and COO
Proforma Printelligence

Bosworth purposely keeps a sign in her office that affects her attitude—it's a framed photo of a landscape and in bold letters it says, Practice Reckless Optimism.

Attitude is everything in sales and in life. Top salespeople recognize that and make feeding their positivity a priority. Every day, Bosworth purposely keeps a sign in her office that affects her attitude—it's a framed photo of a landscape and in bold letters it says, Practice Reckless Optimism. "It's my reminder that every day I have a choice in how I react, and I choose not to react negatively most of the time," she says.

"Keeping a positive attitude in this industry is paramount," agrees Julie Haar, co-owner of Proforma Strategic Promotions in Westerville, Ohio, and another member of Proforma's Million Dollar Club. "The nature of our distribution channel leaves little control over the production and delivery of the product outside of our written instructions through purchase orders. When a tough call or situation happens, I have to shift all my energy to solving the problem with my partners, team and client. Any negativity in those situations will be counterproductive and squash the creativity needed to make things right or whole again."

Joel Kaufmann, field sales manager at supplier PCNA and the company's 2016 U.S. Hard Goods Sales Person of the Year, says attitude is integral to the job and what he brings into every meeting. "No one in attendance can know that you have personal issues or business issues that don't affect them as they are the most important people at that time." Kaufmann looks at it this way: "I truly love what I do, who I do it for and who I am privileged to work with, so when things get as bad as I think they can possibly get, I always know my worst day at the office is still better than the best day at work for many people."

SAGE Senior Lead Account Executive Terri Sparkman, who was recently recognized for having the highest customer retention and for winning SAGE's Spartan Spirit Award, says attitude is everything. "The best part about it is that you can choose your attitude—every day with every situation. I truly believe that if you surround yourself with positive people and be the positive person others want to be around, it will get you much further in all aspects of life, both personally and professionally," she says.

In the inevitable tough situation or when a difficult call needs to be made, she recommends taking a minute to shake off the negative energy. "But again, it's your choice. You can choose to dwell on it and let it bring you down, or choose to move on by learning from it, and use it as encouragement to tackle the next call."

2 Adopt A Routine.

Having a plan to get things done is what often distinguishes the overachievers from those who just toe the line. Whether it's setting up daily schedules, working through a detailed to-do list or scheduling blocks of time to accomplish specific tasks, those who opt for routines over happenstance simply get more done that matters to their bottom line.

Andy Mealor, owner of Proforma Ascension Marketing Group in Macon, Georgia, and a member of Proforma's Million Dollar Club, prepares for the week ahead every weekend. "When it's quiet and I can think, I lay out my days, put them on my calendar and then run

an active weekly calendar. I break it down to five days, and then I break it down for every day. At the end of each day, I sit down and go through what I've gotten done, what didn't get done, reprioritize and plan for the next day. I lay out every day so I don't have to think about my next stop, or my next move, call or appointment. It's in a logical format for me on a calendar. I do that every evening before I go to bed."

Shaun Rolfe, PCNA's field sales manager and 2016 Canadian Sales Person of the Year, likes to get up early and take at least an hour when possible for his "me" time. "Drink coffee, eat breakfast, watch the news, read the paper or whatever floats your boat. This will calm your soul and set you right for a successful day," he says. The night before, he also recommends prioritizing what needs to be accomplished the next day. "Make sure the list is attainable and be sure to accomplish the must do's. Anything that is a 'desired task' can be carried over to another day, but do not remove the task from the ever-flowing list. You thought the task was important for a reason, so find time to do it when you are able."

On days when Proforma's Bosworth doesn't have a lot of appointments, she likes to start her day by clearing her head. She wakes up at 4:30 am, writes for 30 minutes, works out for 10-15 minutes, and then takes her dogs to the lake for a walk. At 9 am most days, she holds a traffic meeting with all employees to talk about projects, what they are waiting for from someone else and what they need to do to smooth the process. Because routines are important, every day wraps up the same way: with a list for tomorrow. She, husband Chris, and every employee do their Final 15. They take the last 15 minutes of the workday and make a list of things that need to get done the next day. On the right-hand side of a sheet of paper Bosworth lists five main goals (some are simple, like sending out personalized, handwritten notecards to two people; some are revenue-generating goals). On the left-hand side of the sheet, she time blocks her appointment calendar for the next day.

Proforma's Haar always takes a few minutes to meditate in the morning, focusing on gratefulness for her life and her work. "I also state my intentions for the day during this brief meditation," she says. "I find this ritual only takes a couple minutes and keeps me centered and focused. With two active kids, ages 12 and eight, my intentions can often be comically simple, like 'I intend to not lose my keys between the kitchen and the garage.'"

Jacque Cook, CAS, a SAGE senior lead account executive who is consistently recognized for earning the highest supplier sales revenue, also likes to be consistent with blocking out her time. "When booking appointments, I prefer to block out the same times daily when making these presentations or webinars," she says. "After the call, it's important for me to send the follow-up to the supplier right away. This helps me remember key points discussed and what was of most interest to the supplier."

SAGE Senior Distributor Account Executive John Peddy, recognized for the most new business, doesn't subscribe to a particular daily routine, but he sets himself up for success every day by walking in with a positive mindset, taking small mental breaks to reevaluate where he is and making minor course corrections throughout the day. "On the days when I don't achieve the amount of success I wanted, I can go home, regroup and come in the following day with hopefully a clearer understanding of what I need to do and what changes I need to make to have a better outcome," he says.

Shaun Rolfe
Field sales manager
PCNA

Rolfe likes to get up early and take at least an hour when possible for his "me" time. "Drink coffee, eat breakfast, watch the news, read the paper, or whatever floats your boat."

John Peddy
Senior distributor account executive
SAGE

Peddy sets himself up for success every day by walking in with a positive mindset, taking small mental breaks to reevaluate where he is and making minor course corrections throughout the day.

Rachel Hare
Field sales manager
PCNA Trimark Apparel

"Our company provides us with a great deal of data regarding our clients' spending habits. I always assess our dashboard before I meet with a client to see where their sales are up and where they are down."

Andy Douthitt
Supplier account executive
SAGE

"No matter the customer or where I am in the relationship, I always have a very good idea of what they sell and what tactics they currently use to promote their products (website, trade shows, etc.)."

3 Prepare To Wow Clients.

Top salespeople leave nothing to chance. They may look cool and casual in how they deliver information and interact with their clients, but they are relaxed and confident only because they have worked like crazy to research, practice and plan their approach and presentations. For most, the preparation begins with knowing as much as possible about the client and what they want to accomplish in each meeting.

"Our company provides us with a great deal of data regarding our clients' spending habits," says Rachel Hare, field sales manager for PCNA Trimark Apparel and 2016 Sales Person of the Year. "I always assess our dashboard before I meet with a client to see where their sales are up and where they are down. This information helps me determine areas of focus or possibly where I might be able to dig a little deeper with the client to help grow a particular category. I also run through my notes on the client to jog my memory about the client's top end users and areas of interest or concern, and follow up."

For Kaufmann, the key is to know his clients' profile. "How do they do their job? What is their preferred method of communication? What do they need from me to be successful? Where have we been successful together before? Where have we failed and why? Most importantly, who are we selling the product to and how are they using it?" A former writer, Kaufmann also creates a set of questions developed from research about the end user from websites, social media and trade magazines that will lead to a sale, knowing he may not get through all the questions. Finally, he preps for the actual encounter. "Similar to an athlete, I visualize the upcoming meeting," he says. "What does the opening look like? After all this preparation, where do I see success? What does that look like?"

Cook likes to review her client's websites and run reports to see how the supplier is trending in comparison to other suppliers.

Her colleague, Andy Douthitt, a SAGE supplier account executive recently awarded for most supplier sales growth, says he may have three meetings in a day where each conversation is completely different because of where he is in his relationship with the client. "If I am calling them for the first time, my goal is to just gather information and find out where I can add the most value based on what they sell and how they sell it. If I am calling someone I have worked with for years, my conversation is going to be different because I know about their family, their company, their best products, and I am just tweaking a few things to make them better. No matter the customer or where I am in the relationship, I always have a very good idea of what they sell and what tactics they currently use to promote their products (website, trade shows, etc.).

Proforma's Haar is also careful to do her homework, including connecting through LinkedIn if it's a first-time meeting. "This gives me a chance to review their role and their history and to see if we have any shared contacts or interests in common," she explains. "Connecting personally in some way always helps me feel more comfortable." For subsequent meetings, she likes to touch base ahead of time with a brief agenda to make sure the meeting will cover everything needed. That way, she has time to prepare if her clients have other topics to discuss. And she always takes relevant samples and/or printouts of virtual mockups to the meeting.

Bosworth is also a believer in having an agenda for every meeting that includes items the client wants to talk about, and never letting a customer leave the office empty-handed. To find the right takeaway, Bosworth pulls out what she calls her random bag of ideas—"sample products from 25-30 categories of product ideas, with a letter that explains that we have 978,932 more ideas if they want them," she says, with a chuckle.

4 Know How To Handle Rejection.

Smart salespeople develop a thick skin over time that desensitizes them to the slings and arrows that might send a less experienced professional running for cover. How did they develop that strength and resiliency? For Cook, it's all in the way you look at it. "The key is to not take it personally," she says. "I also don't really hear the word 'no,' it's just a 'not right now.' Keep following up and eventually you will get a win."

PCNA's Hare takes a similar view. "Rejection isn't easy," she says. "I just remind myself that there is an insane amount of business I have yet to tap into and move on. There will likely be another opportunity later in our history together to revisit the relationship, and I'll take that opportunity when the time is right."

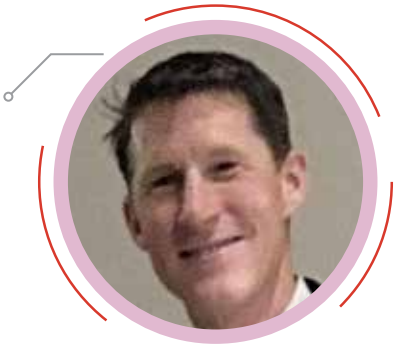
"Rejection does not bother me; it's part of life," says Mealor. "I keep my eye on the big picture and don't allow myself to get bogged down in the weeds. Nobody wants to hear your pity party." Instead, he says to make sure that you are moving in the right direction by setting annual sales goals and tracking them daily. "If I can see myself moving forward, then the little hiccups don't bother me. Step back and take a wide look. Look at what's going well instead of wallowing in the rejection."

Bosworth says that if her proposal is rejected, either she didn't correctly prepare so her client felt there was value or didn't come up with pricing or an idea that was a good fit. She asks the reason so she can do a better job next time. If the problem is simply price—well, she may not want the business any way.

Kaufmann says sales is a game of numbers and percentages. "You have to be in as many games as possible to hope to win as many as possible. I know each loss gets me that much closer to the next win."

Shaun Rolfe handles rejection a little differently. "Recognize that everyone is different. There is no one style that translates effectively with every customer," he says. "Be willing to allow them to steer some of the conversation without losing your message; be flexible but confident, and most importantly, be sincere. In my position as a supplier representative in this industry, I deal with professional salespeople, so trying to *sell* to them is the wrong approach. Education and inspiration is what they are looking for when I am in front of them."

Haar says accepting and learning from rejection is about perspective. "I realize that rejection is a significant part of the sales game. Statistically speaking, each rejection is another step toward the next sale, so you have to keep going," she says. "It also never hurts to ask the client why you didn't win the project and where you fell short. But I always keep it positive. My primary goal is to improve how I connect better with the client in the future."



Andy Mealor
Owner
Proforma Ascension Marketing Group

"Rejection does not bother me; it's part of life. I keep my eye on the big picture and don't allow myself to get bogged down in the weeds. Nobody wants to hear your pity party."

5 Know Your Products And Services.

Bosworth doesn't believe in just winging it—even when attending a trade show. And for good reason: she might miss something that's valuable to her clients. Every year she and Chris attend the industry's largest trade shows. They take with them a list of every client's plan for the next six months and they stop at every booth and ask to see

Julie Haar,
Co-owner
Proforma Strategic Promotions

"Any opportunity we get to meet face-to-face with our suppliers and to see the products firsthand is important to me."

Joel Kaufmann
Field manager
PCNA

Kaufmann solicits market and product research feedback from his kids, ages 21-33, who work in the education and business sectors. "They are true end users, as they are the ones who will be getting our product from corporate America."

best sellers and products specific to their clients' industries. "We know what we are looking for—for example, we know what trade shows our clients have coming up. We go with specific objectives so suppliers can follow up with us immediately. We sit down with our clients when we return from the shows and move the project forward. We also bring in vendors and team up with other Proforma offices and get presentations from local reps."

Haar also leans on her supplier partners for their expertise. "I'll even invite supplier reps as expert consultants to join our team in sales meetings with clients when a specific need arises. I also make it a priority for our entire team to sit in on presentations from our supplier outside sales reps who visit our office, including our sales reps and CSRs."

She also makes going to local and regional supplier showcases and attending Proforma's annual conventions a priority. "Any opportunity we get to meet face-to-face with our suppliers and to see the products firsthand is important to me. Ultimately, if specific features of certain products are important to a client, then it's important to me to find that fit. It's not always about budget and quantity. Selecting a product that represents a brand is a big decision. And that product's features should be carefully considered. Distributors can never know intimately the features of hundreds of thousands of products. But we can discern exactly what our clients want and need, and then we can help narrow the field with the help of our supplier partners."

Mealor gets a lot of his product information from watching webinars and touring production facilities to learn about the products he recommends to clients, but, ultimately, he says it all comes down to the questions he asks of suppliers. "Don't be afraid to ask questions," he says. "If you are not sure, ask."

For professionals on the other side of the industry who sell products and services, the learning curve is just as steep. When SAGE comes out with new products, Eric Seamount, senior account executive recently recognized for having the highest distributor sales revenue, jumps in and plays around with the new features. He also gives credit to his support staff, who shows the team new features and helps them learn about new products. Likewise, his colleague, Douthitt, attends regular company training sessions and integrates the new products and updates into his daily sales meetings. Peddy likes to learn how his distributor clients use SAGE software and ultimately what their goals are. "If you can understand your customers' goals, you look at your products with the appropriate lens," he says.

Rachel Hare, field sales manager for PCNA Trimark Apparel and 2016 U.S. Trimark Apparel Sales Person of the Year, takes a strategic approach to educating her clients about new products. It starts with cultivating a passion for what she's selling. Before each new product launch, she writes out a presentation that digs into *why* a client would want to sell her line over her competitors'offerings.

Next, she notes the features and benefits of each product in the catalog. Once she's generated an interest in the line, she goes through the catalog with her clients and runs through her relevant notes. "After the first couple of presentations, I don't need the notes anymore," she says. "Also, I *listen* to the feedback my clients give me. Often, they'll come up with cool ways to use or sell a product that I'll then incorporate into my presentation."

Kaufmann says he interacts closely with PCNA's product development team members. "They are an amazing resource, as they have spent substantial time with the product brought to market to assure it's one that is worthy of making our catalog." He also researches the retail intent of the product as a consumer, and finally, he solicits market and product research feedback from his kids, ages 21-33, who work in the education and business sectors. "They are true end users, as they are the ones who will be getting our product from corporate America," he says.

6 Manage Your Precious Time.

It's an old saying, but it's true: everybody gets the same 24 hours in a day, but some people simply do a better job managing their hours to get more done. What makes a difference to Bosworth is time blocking and delegating everything that is not a good fit for her expertise. "Too many of us are perfectionists and expect the same from other people," she says. "Only strive for 80 percent from people who work for you; never expect more than 60 percent. One hundred percent is overkill."

Distributor owner Haar also believes in keeping it real. "Some days I feel like I'm constantly putting out fires and spending hours being reactive," she says. "I find that the more my team and I proactively stay on top of requests for information and order status updates, the smoother things go." Another Proforma distributor once advised her to write notes for order entry and next steps that she leaves for her team with the clear intention of helping those teammates understand the process for that particular project.

"That stuck with me," she says. "I try to delegate as many of those steps as possible once an order is in progress so I can focus time on building the business and prospecting. Spending a little time up front to give quality direction saves a lot of back-and-forth time with production facilities and even clients." She also offers these ideas: keep a standing Monday morning team meeting on the calendar to stay ahead of open orders and projects in the pipeline, maintain a shared calendar with team members to plan meetings and calls efficiently and keep a running Google Sheet on all open orders with color coded cells assigned to each team member.

Distributor owner Mealor also gains efficiencies by thinking through his day the day before—where he will be and looking at patterns so he's not driving from one end of town to another and back. He tries to line up his appointments and meetings and time block his day. He keeps an eye on the big picture to help control his daily activities. "I have a big picture productivity planner—the idea is to find three big-picture things I am trying to get accomplished in the next six or 24 months. Below that, I itemize what I need to do to achieve each objective. This way I can ask, 'Is the activity I'm doing right now relevant to my goal?'"

From a task perspective, PCNA's Kaufmann works in time blocks, assigning different elements of the job per block. For example: presentations, one-on-one meetings, end-user sessions, time to be proactive and time to be reactive. "I use blocks rather than hours or minutes because I neither want to be limited by the clock nor feel the need to stretch out a task to fit into a time frame," he says. "I then fill those blocks based on dollar value, knowing how much a given end user, project or response can return."

For SAGE's Cook, productivity is all about planning her day. "Walking into my office with a game plan and knowing what needs to be done ahead of time helps keep me on track and focused. I also find that it helps to deal with the things that I might be dreading or not excited about."

By getting into "doing" what needs to be done and not just thinking about it, she's able to get those things knocked out. Also, she does not want to be controlled by her email inbox. "It's easy to see an email come through and get distracted," she says. "The urge to stop what I am doing to respond can be disruptive to what I need to get done. I try to block out times throughout the day to get through emails. This way, I am being proactive, not reactive."

When it comes to handling routine questions from clients, Seamount creates a

Jacque Cook, CAS
Senior lead account executive
SAGE

"Walking into my office with a game plan and knowing what needs to be done ahead of time helps keep me on track and focused."

shortcut called Quick Parts in Outlook. It's a library of emails he can plug into a current email and quickly respond to clients. "Above all, in sales you have to be selling, and I make sure I get in at least one hour of making cold calls every day. Set a time to do that. Mine is 11 am. That time is my time to be successful."

Technology aims to help people work smarter and more seamlessly, but it also has its distractions. "I can create reminders and alarms on my phone, but then get sidetracked with a Facebook or Instagram post. I find I am most successful when I block out my time—30 minutes here for email, 30 minutes there for calls or answering voicemail, etc.—and leave my phone on the charger so I don't look at it as frequently."

Sparkman says time management is the area she struggles with the most. "I don't want anyone to ever feel rushed when they are talking with me or asking me questions, so I tend to spend quite a bit of time with others, and my day easily (and quickly) gets away from me." She says she's had success managing her time when she uses a calendar to block out time for everything—checking/responding to emails, returning phone calls, calling current customers, focusing on prospects, etc. "The key is to treat the time I've blocked as an appointment I have to be present for and not just dismiss it."

Eric Seamount
Senior account executive
SAGE

"Above all, in sales you have to be selling, and I make sure I get in at least one hour of making cold calls every day. Set a time to do that. Mine is 11 am. That time is my time to be successful."

7 Organize Everything.

Like many salespeople, Hare's workspace can move from the cafeteria at an end user's office to a Whole Foods to a hotel lobby, so her two most valuable organization tools are game changers. "The first is OneNote. This program allows me to take notes during every meeting, access all my notes from any device and, most importantly, organize and categorize all the information I might need to find. It's also searchable, which is key since I often forget which folder I used. The other is followupthen.com. It allows me to schedule reminders in the easiest possible way. I always struggled to find a system that allowed me to schedule follow-ups—my calendar got too cluttered if I used it for reminders, and if I put things into a folder for follow-up, it was too easy to ignore. This service delivers follow-up reminders right to my email inbox, whenever I want to schedule them." She advises, "Do yourself a favor and visit their website to watch the short video explaining their service."

While Hare likes tech tools, others interviewed for this article like to go "old school"—keeping a clean desk outfitted with only a cell phone, laptop and a notebook. "I use a notebook and write things out," says Mealor. "I tried to use my cell phone to track stuff, but less is more. The simpler you keep it, the better."

Bosworth also likes the traditional route and makes a folder for every project. "Having the notes available to take home with me is helpful; I don't want to be sitting with my computer on my lap."

When he's working, PCNA's Kaufmann likes to keep everything he needs within arm's reach. "Getting up from my chair breaks work momentum and gives me cause to find other things to do while I'm up," he says, adding that he's very visual so it helps to see everything at once. He uses an electronic version of his schedule but also keeps a planner book open to the week at hand. "I set up my laptop, phone and tablet as multiple screens, viewing current email with one, a website with

another, and leaving the third open for necessary activity." He also keeps a pen and paper handy for immediate thoughts. "That's how I remember the next course of action," he says.

Proforma's Haar and her business partner keep private offices on the opposite ends of their office space, and in between are a series of semi-private cubicles for their sales reps. One of the cubes is dedicated to catalogs and reference materials. On the other side of the space is what she calls a bullpen—a series of U-shaped work surfaces for fulfillment projects and displaying supplier samples during a lunch-and-learn. "We have a cloud-based network server that holds our files so that the team can have access to art and marketing materials at any time without asking for it or emailing it," she says. "I love having a second screen at my workstation so that I can toggle easily between orders and information. I also love our VoIP phone system that rings the entire office if someone does not answer their phone. It can also be used seamlessly on a laptop if someone wants to work from another location." Another tool she favors is her Pantone color book. "I religiously put it back in its sleeve so that the colors don't fade."

8 Ask The Right Questions.

Terri Sparkman
Senior lead account executive
SAGE

Sparkman says it's all about listening to the customer. She opens the conversation by making sure she understands what their business entails and how they are currently using the tools they have in place.

The questions these top salespeople ask their clients is as important as what they say during a presentation or sales call. SAGE's Sparkman says it's all about listening to the customer. She opens the conversation by making sure she understands what their business entails and how they are currently using the tools they have in place. "By having an open dialogue, I can usually identify any pain points, must-haves and wish-list features," she says. "After they have shared with me, I try to relate to them and provide solutions to make their day just a little easier by streamling their current processes using our products."

Haar positions her distributor company as a solutions provider, so her questions routinely revolve around the client's intentions for each order and understanding their pain points. She asks about target audience, quantities, messaging and themes, and expected actions and reactions related to the item. She also asks clients for their brand standards.

Owner Bosworth says she learned how to ask questions from a sales trainer years ago. The presentation that stuck with her uses the acronym DICTATE:

- **D**etail: Why are we here? What do you want to accomplish?
- **I**nterval: How long do you have to solve the problem?
- **C**ost: What is it currently costing to fix the problem now? What is your budget to fix the problem?
- **T**ry and Fix: What have you already done to fix this?
- **A**ction or Inaction: What actions have you done or are willing to do?
- **T**alk Less: Remember not to start selling yet; get to the emotion of the real problem.
- **E**motion: Listen for the reason they want to do business with you.

Distributor Mealor says that if you go into a call and try to shotgun-sell them everything you have, you may get an order, but you'll miss the big picture. "Sit back and listen to where their challenges are. Think through the tools, services and products, and try to craft the right solution. This approach allows you to ask strategic questions." PPB

Tina Berres Filipski is editor of PPB.