SALES PROCESS & TRAINING MASTER DOCUMENT

QUICK REFERENCE

THE BEEMAC LOGISTICS MENU

Beemac Logistics is your complete turn-key transportation and logistics expert. Customers choose us because we offer the highest quality transportation services paired with best in class technology and outside the box problem solving and solution delivery. We work around the clock to provide our customers with unbeatable service and competitive freight rates. We pride ourselves as being the most reliable provider of transportation solutions in North America. To ensure the quality, timeliness and cost-effectiveness of our customers shipments, we hold our team to high performance expectations and safety guidelines. Our logistics professionals undergo rigorous training and showcase extensive knowledge of mileage rates, equipment requirements, operating parameters and market conditions.

At our core, we are a transportation solutions provider covering all modes of transportation as well as material management needs. Being born of an asset-based trucking company, Beemac's understanding of the complexities of transportation and logistics industry runs much deeper than most of our competitors.

In this section we will review the services that Beemac Logistics offers and performs. Like any good steakhouse, we have our core service offerings that we are best known for, our lesser known but convenient items, sides and deserts. Just like someone goes to Hyde Park or Ruth's Chris for a good steak, sometimes someone in your party orders the chicken. Steaks come with different sauces and toppings, but nobody would go into one of these restaurants just to order some diced mushrooms and hollandaise sauce. A good salesperson will understand the menu and the combination of services that are most impactful to the customer experience.

However, just knowing the menu items isn't good enough. You'll need to understand why our steak is better than the competitions, the ingredients, how it's prepared, and how it is best served with select side items. Inversely, you should know why preparing a steak differently than our menu calls for or how recommending a dish not aligned with your customer's expectations can detract from the customer experience.

Understand our primary service offerings, how they are best delivered and are most beneficial to the customer experience. Know our secondary service offerings, how they create value for customers but are most effective in conjunction with a primary service. Experiment with the various value-adds and the different ways they benefit the customer. Lastly, know which services are not beneficial to the customer experience when delivered alone. Just like a good restaurant may refuse to serve their steak well done for fear it will diminish the value of their core product, there are times where offering the wrong service will diminish ours.

While Beemac is known for its industrial experience and expertise, we utilize the same technology, process and expertise to offer any of the other services we provide such as dry van shipping, refrigerated, LTL, etc. to create the same customer experience across the board.

Who we are?

- A North American market leader in industrial shipping and transportation solutions
- Asset-based logistics solutions provider with unmatched capabilities with experts across all modes or transportation and equipment types
- Beemac Inc. is Employee Owned
- Financially solid
- Very low driver turnover in competitive space
- Exemplary payment history with carrier base
- Unprecedented continued year over year growth

What do we do?

- ❖ Asset-based TL Shipping
    - o 500 Truckload units
        - ▪ Approx. 450 flatbeds and specialized trailers
        - ▪ Approx. 40 Dry Van
        - ▪ Approx. 10 Pneumatics

- ❖ Brokerage TL Shipping
    - o Comprehensive network of Owner-Operators
    - o Dry van, Flatbeds, Reefer, Drayage
    - o Carrier Procurement & Rate negotiation
    - o Expedited / Hot Shot
    - o To/from Mexico
    - o To/from Canada
    - o Canada to Canada

- ❖ Multi-modal solutions

- o Rail
- o Barge
- o Break Bulk Ocean Shipping
- o Ocean Container Shipping
- o Air

- ❖ Material Handling Solutions
  - o Nationwide Trans-loading network
  - o Indoor warehousing
  - o Outdoor storage / laydown
- ❖ LTL Shipping
  - o TMS
  - o LTL Accessorial Options:
    - ▪ Residential & Liftgate Deliveries
    - ▪ Oversized freight
    - ▪ Sealed divider
    - ▪ Military, School & Hospital Deliveries
    - ▪ Appointments & Notify
    - ▪ Hazardous materials
    - ▪ Tradeshows
    - ▪ White glove
    - ▪ Cargo insurance

- ❖ Shipment execution, visibility and tracking
- ❖ Invoice Customization
- ❖ Experienced supply chain consultation

What are the benefits of what we do?

- ❖ Provide choice, scalability and proven service reliability
- ❖ Reduce Costs, Transit times and waste
- ❖ Increase visibility of shipments and supply chain
- ❖ Provide for a simple, repeatable processes

What's exciting about Beemac Logistics?

- ❖ Evolving portfolio of services
- ❖ Continued investment in and development of cutting-edge logistics technology
- ❖ Increasing buying leverage
- ❖ Increasing procurement network
- ❖ Continuous employee training

Who do we serve?

- ❖ Evolving portfolio of clients including:
    - o Manufacturing
    - o Automotive
    - o Oil and Gas
    - o Retail
    - o Consumer Packaged Goods
    - o Agricultural
    - o Food

THE PROCESS

In this section we introduce you to THE PROCESS. Point to any successful enterprise whether it be a business, or a sports team and you will identify any number of factors that differentiates that unit from their competitors. You will cite talent, leadership, the quality of the product or the genius of their marketing. You will talk about background, history, schooling, work ethic and even the outliers. As important as any of these factors are, there is no greater indicator of success than a good system and repeatable process.

"Know what you want to accomplish and focus on the process rather than the outcome." – Nick Saban

The New England Patriots dynasty has lots of superstars, but it's the system that has produced superstars and championships year over year for nearly two decades.

"We are what we repeatedly do. Excellence, then, is not an act, but a habit." – Wil Durant

Processes aren't sexy. However, repeatable, successful results, are.

The Process is designed to:

1. Identify the greatest number of businesses with the greatest likelihood of benefiting from Beemac Logistics services
2. Identify the most impactful business needs they have that Beemac Logistics has the most impactful solutions for
3. Develop long term, sustainable business relationships with the highest profitability

The Process is not designed to:

1. Sell to everyone
2. Be all things to all people
3. Produce transactional, low yield results

The Sales Process has many steps and boxes to check, but they happen over time – often even out of order. The foundation of the process that cannot be successfully compromised is:

1) Prospecting
2) Selling
3) Developing

STAGES OF THE PROCESS (*THE PIPELINE*):

- ➢ Leads
- ➢ Prospects
- ➢ Opportunities
- ➢ Commitments
- ➢ Development
- ➢ Customers

THE PROCESS OVERVIEW (STEPS)

- ➢ Identify & Qualify Prospects
- ➢ Investigate Needs
- ➢ Present Solutions
- ➢ Activate the Account
- ➢ Develop the customer
- ➢ Manage the relationship

THE PROCESS OBJECTIVES:

The primary objective of each step of the sale is to get to the next step!

- ➢ Identify & Qualify Prospects
  - o Cold Call leads
    - ▪ Initiate Contact
    - ▪ Identify the Prospecting Points
    - ▪ Continue to Prospect or Disengage
  - o Warm Call leads
    - ▪ Engage with Primary Contact
    - ▪ Identify the Qualifying points
    - ▪ Convert to Qualified Prospect or disengage
- ➢ Investigate Needs
  - o Engage with Decision Maker
    - ▪ Investigate Business Needs
    - ▪ Gain a financial opportunity
    - ▪ Secure account application
- ➢ Present Solutions
  - o Match Beemac Solutions with the customer needs
  - o Present pricing
  - o Demonstrate the solution
- ➢ Activate the Account
  - o Ask for the Business!
  - o Set up the account
  - o Set expectations, book the first shipment and gain commitment!
- ➢ Customer Development
  - o Meet Expectations and hold customer accountable to their commitment
  - o Cultivate referrals
  - o Get sticky!
- ➢ Manage the relationship
  - o Execute a touch point plan
  - o Resolve service issues

o Perform periodic business reviews
o Review pricing and internal opportunities

THE PROCESS BEST PRACTICES:

➢ Professional salespeople create new opportunities, they don't wait for them to come
➢ Professional salespeople anticipate objections in advance, they don't try to avoid them
➢ Professional salespeople are selective in the business they pursue
➢ Professional salespeople run their days; they don't let their days run them
➢ Professional salespeople introduce new ideas to their clients; they don't wait for their clients to ask
➢ Professional salespeople preempt pricing objections with value adds, they don't lower their price
➢ Professional salespeople take responsibility for their own professional development

THE PROCESS HELPS US TO:

➢ Run from unqualified prospects
➢ Articulate a clear value proposition and differentiate yourself from your competition
➢ Ask discovery to questions & mold our message to the prospect's pain
➢ Overcome pushback & objections
➢ Ask for a commitment

KEYS TO MAKING THE PROCESS WORK FOR YOU:

➢ Have clear weekly and daily plans and objectives. Write them down and be accountable!
➢ Pursue the highest level within an organization & learn C-Level language
➢ Focus on outcomes & value – not features!
➢ Seek to understand, not to be understood
➢ Be a Detective, don't just accept what's on the surface
➢ Direct your prescription at the pain
➢ Take your prospects temperature & flush out objections before they occur
➢ Ask for what you want!

IDENTIFYING PROSPECTS:

➢ Cold Call leads to determine if they are a potential fit & determine initial sales approach
➢ Phone prospecting remains the most common and most effective method of engaging prospects
    o Initiate contact with someone who is familiar with shipping processes
        ▪ Introduce yourself & Beemac
        ▪ Identify the Prospecting Points & Determine if they are a prospect
            ● Identify Decision Maker or Influencer by full name & title
            ● Identify weekly shipping volume
            ● Identify primary transportation modes as domestic or cross border Expedite or Full Truckload
            ● Confirm that the company pays for the shipping
    o If no contact was made or contact was made but no information attained, log a call and move on
    o If contact was made and partial information attained

- If enough information attained to unqualify the account, log a call and disengage
- If enough information was attained to pursue, log a call and set a task to follow up
  - o If contact was made and all prospecting points were attained
    - If identified not to be a prospect, log a call and disengage
    - If identified to be a prospect, log a call and set a task to follow up or continue the conversation
  - o Leave a voicemail whenever applicable
- ➢ Determine initial sales approach

INITIAL SALES APPROACH

No two businesses are exactly alike. As you work The Process you will begin to tailor your sales approach to the individual company, decision maker, and specific needs they have. However, in the beginning, you have limited information and need to choose a path for which to pursue the account. The primary determining factor in choosing an initial sales approach is the company's primary shipping mode and volume.

Your initial sales approach will outline target decision makers, strategy for needs investigation and solution development, even average sales cycles.

Weekly Volume:

- ➢ 0-4   Domestic or cross border Truckload
  - o Transactional
    - Pursue Shipping employees, Shipping Manager, or Business Owner
    - Investigate current situation
      - Quote shipments
      - Look for quick wins
    - Sales cycle: 1-10 business days
- ➢ 5-10   Domestic or cross border Truckload, domestic LTL
  - o Daily Shipper
    - Pursue Business Owner, Executive, or Manager
    - Investigate Shipping Problems
      - Get invoices or recent shipment data
      - Identify 2-3 pain points
      - Match customer problems with Beemac Logistics Solutions
    - Sales Cycle: 5-15 Business Days
- ➢ 11-25   Domestic or cross border Truckload, domestic LTL
  - o Multiple Daily Shipper
    - Pursue Business Owner, Executive or Director
    - Investigate Business Problems
      - Get invoices or lane data
      - Identify 2-3 *Business* Pain points affected by shipping
      - Provide Value Solutions
    - Sales Cycle: 10-20 Business Days
- ➢ 26+   Domestic or cross border Truckload, domestic LTL
  - o Large Client
    - Pursue Director, Executive, Manager or Business Owner
    - Investigate Implications of Business Problems
      - Get invoices, lane data or bid sheet
      - Identify 2-3 Business Implications that are affected by shipping

- Provide Value Solutions
  - Sales Cycle: 10-30 Business Days

IDENTIFYING PROSPECTS

WHY:

- ❖ Determine who to sell to; <u>NOT</u> to sell
    - o Identify companies who <u>might</u> benefit from our services
    - o Identify companies who <u>might</u> be worth our time to pursue
- ❖ Initiate the sales process

WHO:

Identified Decision Maker by full name & title

New programs have a:

93% likelihood of being adopted when implemented by the Owner or President
87% likelihood of being adopted when implemented by the C-Level
64% likelihood of being adopted when implemented by a VP or Director
34% likelihood of being adopted when implemented by a manager
11% likelihood of being adopted when implemented levels below management

Top management:

- ❖ Often possess final decision- making authority and can make decisions must faster!
- ❖ See the true financial impact of your solution and can authorize a larger financial commitment
- ❖ Connected to other top executives and can streamline negotiations, logistics, payment matters and set the scope of what's important

Decision Makers come in different titles. To qualify as the "DM", they must have each of the following:

- ❖ Financial capacity
- ❖ Authority
- ❖ Interest
- ❖ Need
- ❖ Timing that matches ours

Who controls the money controls the decision. Sell where the money is!

WHAT:

- ❖ *COLD CALLING!!!*
    - o To capture and create interest and then convert that interest into a conversation
    - o The process of initiating contact with businesses you're not currently engaged with for the purpose of determining a potential fit
    - o Prospecting is the single most important thing a salesperson will do each day
        - ▪ Ratios
- ❖ Point of entry into a sales call

WHEN:

- ❖ *EVERY DAY!*
    - o *To success in sales you must create new conversations each day*
- ❖ Most effective is 9-11am local time, Tuesday & Thursday

- o 7-9am
- o Followed by Wednesday
- o Then Friday & Monday

WHERE:

- ❖ "Local" time. Be cognizant of issues such as:
  - o Weather
  - o Natural disasters
  - o Seasonality
  - o Regulatory issues
  - o Tribal knowledge

HOW:

- ❖ Effective cold calls should not:
  - o Pitch your specific product or service
  - o Present specific features of your product or service
  - o Detail strategies to use your product or service
  - o Make unsubstantiated claims or guarantees about your product or service
  - o Make specific assumptions of why they would want to buy from you
- ❖ Remember, it's an introduction!
- ❖ Prospecting keys for success:
  - o Never ask if it's a good time to talk
  - o Repetitiously use the persons first name
  - o Be direct, don't be vague!
  - o Be enthusiastic! Stand up. Move around. Smile.
  - o Listen up!
  - o Always call one level higher
  - o Be willing to cut your losses
  - o Call early, call late, call during lunch
  - o Consider calling a different department and ask to be transferred
  - o Take notes
  - o Stay on message, avoid rambling, and keep it short and sweet
  - o Less is more – prospecting isn't selling
- ❖ Don't be an infomercial. Nobody cares:
  - o How long we've been in business
  - o How many shipments we move or how many carriers we do business with
  - o How many employees we have, walls we've knocked down or offices set up
  - o How many locations we have, revenue we generate or forecasts for upcoming years
- ❖ An effective cold call should:
  - o Include a simple, brief description of what we do and why they should care
  - o Generate interest by focusing on outcomes
  - o Be consistent

Before you begin...

- o Leads have business name & phone number
- o Often, leads have a contact name and title
- o Never assume the contact name is accurate or that they are a decision maker
- ❖ The purpose of the initial contact is to gather information

- o You first want to establish contact with the person who can accurately provide information
- o The initial contact often does not have final or ultimate decision-making authority
- o Be friendly – be professional – be direct
- o Nobody wants their time wasted
- o Not all negative responses from your initial contact are objections. Pay attention.
- o The first objection is always a knee-jerk reaction to a sales call. Ignore it. Save rebuttals for the real objections
- ❖ Engaging the Decision Maker is an objective of the selling process, but is not the primary objective of a cold call

Prospecting Points – Is the account worth pursuing?

Qualified Prospect – Is the account a fit for Beemac criteria?

Prospecting Points:

1) Identified the Decision Maker by full name & title
2) Identified the shipping volume by number, frequency and mode
3) Identify primary transportation modes as domestic or cross border Expedite or Full Truckload
4) Identified that they are financially responsible for the shipping

Identified the Decision Maker by full name & Title:

CEO, President or Owners – they can always make the decision to change. They are responsible for overseeing the entire organization. They have information of how different departments interact with one another and how a change in one process may impact another. They will rarely make a 'transactional' buying decision but can always make an impactful business decision.

C-Level (not CEO) – It is often the primary responsibility of a C-Level executive to make decisions that impact the entire organization. For example, it is the CFO's job to ensure the profitability of the company. This involves cutting direct costs (apples to apples); improving operational efficiency; streamlining processes that reduce the need for FTE's; improving payables; negotiating payment terms; reducing excess payments; and reporting on financial activity across the board. A CFO will rarely be involved in a single shipment transaction but may often be involved in a program that financially impacts multiple departments.

A COO is primarily responsible for the operational efficiency of the company. Whereas a shipping manager may not be aware of the issue's customer service have, it's the job of the COO to know and solve both issues. The Director of logistics may know every piece of freight being shipped in or out but may not be aware that the Sales Department is struggling because of inefficiencies in the warehouse. The COO may never be involved in a single shipment transaction but should be aware of the constraints of the IT department to provide visibility to the financial department of the shipping department. A CIO may have more visibility into the need for a TMS or streamlined shipping system whereas the shipping coordinator may have no insight into the companies need for better information flow. Lastly, a CCO may have more interest in services that help the commercial / sales group of the organization close more deals. Transportation and logistics spend is a significant line item expense that can be the difference between winning or losing deals.

Titles – Don't sell to titles, but they are an indication of the roles and responsibilities of the person. It doesn't necessarily speak to their purchasing interest or authority but should be indicative of how they interact with different departments.

Full Names – This speaks to YOUR professionalism. If there's a dozen people named "Sarah" in an organization, how embarrassed should we be when asked the last name of the Sarah we are calling for and

don't know it. It's also a first piece of information that shows we're serious. It's like making your bed in the morning. If you can get the last name and title of the potential contact, you should feel even more confident in getting the next piece of information. Last names are required for account set ups, for billing information, and for any supplemental marketing information. You're going to need it eventually, so why not get it early rather than later when it's already expected that you have it. Lastly, these people don't know us. Why would they spend time, let alone let you have unfettered access to their product, if you aren't professional enough to secure the last name of the person you are speaking with.

Identify shipping volume by mode, number & frequency:

- ❖ The shipping volume by mode is the primary data point in determining which sales approach to take
- ❖ The shipping volume by mode is the primary data point in prioritizing leads
- ❖ The shipping volume by mode is the primary data point in assessing pricing strategy
- ❖ It must be a number. It can be an average, a specific range, or specific data, but needs to be a number.
  - ○ *"Daily"* - There's a big difference between 1 a day and 10 a day
  - ○ *"Weekly"* – there's a big difference between 1 a week and 10 a week
- ❖ The prospect's ability to answer this question is an indication as to the accuracy of the answer
- ❖ Size is relative – the manufacturer across the street from Walmart will not think they are very big whereas 20 shipments a week may be a homerun to you.
- ❖ The shipping volume is an initial indicator of whether value can be created and may benefit from Beemac Logistics services
- ❖ The shipping volume is a good indicator of when and how often to contact the account

Identified the Primary Mode is domestic or cross border TL or Expedite

It's important to ensure that the primary mode is TL Expedite or that if TL/Expedite is not their primary mode, the volume is still significant enough that the account is still worth pursuing.

By remaining vigilant in obtaining this information, it will help us to avoid modes that we don't service or situations where we may not be able to meet expectations. Our role here is not to turn everything into a sale, but rather to walk away from things that are not likely to become a sale. We're looking for fish!

Identified that the account is financially responsible for their shipping

Many customers use similar terminology to describe different meanings. Terms such as *freight collect, our customers pay, our customers choose, customer routed, prepay, etc.* do not necessarily mean that there is no opportunity.

It is just as likely that even if their customer determines which carrier to use, that the prospect in question is still receiving an invoice from the carrier. That is what we are trying to determine.

Who receives the invoice from the carrier / broker?

The person who receives the invoice and cuts the check is the prospect.

Confirming who is financially responsible for the freight is also another benchmark of verifying volume. A prospect who says they are shipping 20x per week but is only responsible for paying for 2 of them is a wildly different opportunity. Confirming this early on can save you a tremendous amount of time and opportunity cost pursuing an account you believe does more than they can give us an opportunity for.

Prospecting Structure:

Remember your objectives!

Scripts:

- Repetition is how to avoid sounding canned, robotic, or unprepared
- The structure of your cold calls should always remain the same
- A sound, repetitive structure is the best way to maintain control of your sales call
- Most of a sale can't be scripted, so control the controllable!
- Scripts allow you to focus on listening

The Cold Call

Introduction to Gatekeeper (GK):

- ❖ Greeting
- ❖ Name
- ❖ Identification (ID)
- ❖ Purpose
- ❖ Call to Action

Introduction to Initial Shipping Contact (ISC):

- ❖ Greeting
- ❖ Name
- ❖ Identification (ID)
- ❖ Re-qualify
- ❖ Purpose
- ❖ Prospecting Questions

Cold Call: **Connected to a Name**

Greeting: Good morning!

Name: My name is [*first name*]

ID: with Beemac Logistics.

Purpose: I'm calling to learn about your company's shipping process.

Call to Action: Who could you direct me to?

                 That would be [name]…

[CONNECTING]

Greeting: Good morning [*name*],

Name: This is [*first name*]

ID: with Beemac Logistics, thanks for taking the call.

Re-Qualify: I'm calling to learn more about your shipping process and was told you'd be the person to speak with. Is that correct?

[YES]

Purpose: Excellent!

Prospecting Questions:

- ❖ Do you ship or receive Full Truckload Shipments?
- ❖ Do you receive Expedited Shipments?
- ❖ What is your average volume per week?
- ❖ And you're responsible for paying for the shipping?

Identify Decision Maker by full name & title:

I have [*Business Owner name*] as the Business Owner, would they be the person ultimately responsible for business decisions?

- ❖ Who makes business decisions for the company?
- ❖ Who makes financial decisions for the company?
- ❖ Who makes contractual decisions for the company?
- ❖ Who is the person who negotiates contracts with your carriers?
- ❖ Who makes vendor/purchasing decisions for the company?
    - o Who is responsible for choosing your current carriers?
    - o Who is responsible for approving carriers?
    - o Who is the person who approves quotes?
    - o Who is the person who selects the carriers to ship with?

Move onto *Qualifying*, unqualify or disengage:

- ❖ Unqualify if the information provided determines they are not a prospect:
    - o Ok, sounds like you guys are in good hands! Thanks for the information and enjoy the rest of your day!
- ❖ Disengage if the information provided determines they are a prospect:
    - o Ok, great! Well I appreciate your time and information. Enjoy the rest of your day!

Voicemails:

- ❖ An overwhelming majority of your outbound calls will result in the option to leave a Voicemail. **DO SO**!
- ❖ An overwhelming majority of the voicemails you leave will go unreturned. However, there is exactly a 0% chance someone will return your call when they're unaware you called in the first place. Leaving voicemail costs nothing.
- ❖ Create a cadence of contact, letting the contact get familiar with your name, your company, and your efforts to reach them.
- ❖ Won't they screen me more?
  - o Perhaps. But they weren't going to take or return your call anyways, so you've lost nothing.
- ❖ How often to leave voicemails?
  - o There's no perfect science. But a contact who is only made aware of your efforts one time per week will not even commit the name to memory let alone return your call. So, they need to hear from your multiple times with frequency.
- ❖ Do I leave multiple voicemails per week?
  - o Yes.
- ❖ Do I leave multiple voicemails per day?
  - o Perhaps. Perhaps one day yes, one day no. Perhaps after your second attempt you follow up with an email rather than a voicemail. Perhaps you leave a message with the receptionist or someone else. *Tweet. LinkedIn. Text.* Get creative.
- ❖ Be efficient with your time. Leaving multiple messages, emails, connecting via LinkedIn and other sources may not be a good use of your time prior to identifying whether it's a prospect. With each step of the sales process, your contact attempts should increase frequency and methods.
- ❖ Keep it simple! **Don't sell over a voicemail!**

Voicemail Message:

"Hello, [*Business Owner first name*]. This is [*First* name] with Beemac Logistics. My phone number is [*xxx*]-[*xxx-xxxx*]. I'm calling to share with you how I've been successful helping companies in the [*their* industry] to deliver expectations by providing concierge level service they can rely on. Please return my call at [*xxx*]-[*xxx-xxxx*]. Again, this is [*first name*] with Beemac Logistics. Thanks, and I'll look forward to hearing from you."

If you know something about them:

"Hello, [*Business Owner first name*]. This is [*First* name] with Beemac Logistics. My phone number is [*xxx*]-[*xxx-xxxx*]. I'm calling about [*that specific, tangible, relevant information you have*]. Please return my call at [*xxx*]-[*xxx-xxxx*]. Again, this is [*first name*] with Beemac Logistics. Thanks, and I'll look forward to hearing from you."

If you know nothing about them:

"Hello, [*Business Owner first name*]. This is [*First* name] with Beemac Logistics. My phone number is [*xxx*]-[*xxx-xxxx*]. I'm calling to introduce myself. Please return my call at [*xxx*]-[*xxx-xxxx*]. Again, this is [*first name*] with Beemac Logistics. Thanks, and I'll look forward to hearing from you."

Documentation: Set yourself up for success!

- ❖ What was the objective of your call?
- ❖ Who did you speak with?
- ❖ What was discussed?
- ❖ What was the outcome of the conversation?
- ❖ What and when is your next step?

Cold Called & spoke to John Smith. Mike Jones is Owner. Typical Volume is 4-5 outbound Truckload per Week. They pay for it. Left voicemail and will try Mike this afternoon.

Or:

CC TT John Smith. DM is Mike Jones. Vol 4-5 TL/Wk OB. LVM. Try Mike this afternoon.

QUALIFYING PROSPECTS

Since the primary objective of identifying prospects is to determine shipping volume and initial sales approach, researching companies in advance is counterproductive at this stage. Most cold calls do not result in prospects and most initial calls to prospects do not result in sales conversations.

However, when qualifying prospects, you may have the opportunity to learn a little bit about the company prior to making your warm call. Depending on the sales path, the deeper you get into the process the more you will want to learn about the prospect.

Initially:

1. For Transactional accounts, this may not be a productive use of time.
2. Daily Shippers merit at least a quick visit to the company website before placing the call.
3. Multiple Daily shippers may also want to include quick search on the primary contact before placing the call.
4. Large-Client should include logging onto their website, their social media, and learning about the product itself.

   ➢ Warm Call prospects to determine if they meet Beemac Logistics criteria and set next step
      o Engage with Primary Contact to attain information
         ▪ Deliver the Initial Benefit Statement
         ▪ Identify the Qualifying Points
            ● Requalify Decision Maker(s) and Influencer(s)
            ● Requalify weekly shipping volume by mode
            ● Requalify prospect pays for the shipping
            ● Requalified primary mode is domestic or cross border TL
            ● Identify shipping lanes, regions, locations (Required for TL only)
            ● Identify incumbent providers, brokers, etc.
            ● Identify mode(s) and equipment used (Required for TL only)
            ● Identify commodity
            ● Identify special requirements, equipment or services
            ● Identify quoting, booking and selection process
      o If no contact was made or contact was made but the call was unsuccessful, log a call and set the appropriate follow up task
      o If contact was made and partial information attained
         ▪ If enough information attained to unqualify the account, log a call and disengage
         ▪ If enough information was attained to pursue, log a call and set a task to follow up
      o If contact was made and all qualifying points were attained
         ▪ If unqualified, log a call and disengage
         ▪ If qualified:
            ● Log your call
            ● If speaking with the DM, log your call, set a next step or continue the conversation
               o Send a follow up email
            ● If not speaking with the DM, log your call and set a follow up task
               o Leave a message for the DM if applicable
               o Send an introduction email
      o Leave a voicemail whenever applicable

The objective of this step is to get to the next step!

A "Next Step" is a set date & time with a Decision Maker with an agreed upon objective.

Cold Call: **Connected to Business Owner**

Greeting: Good morning!

Name: My name is [*first name*]

ID: with Beemac Logistics.

Purpose: I'm calling to learn about your company's shipping process.

Call to Action: Who could you direct me to?

                           That would be [name/Owner] …

[CONNECTING]

Greeting: Good morning [*name*],

Name: This is [*first name*]

ID: with Beemac Logistics, thanks for taking the call.

Re-Qualify: I'm calling to learn more about your shipping process and was told you'd be the person to speak with. Is that correct?

[YES, I'm the Owner]

Purpose/IBS: Excellent! We help businesses deliver expectations by providing personal, concierge level service our customers rely on:

Prospecting Questions:

Prospecting Questions:

- ❖ Do you ship or receive Full Truckload Shipments?
- ❖ Do you receive Expedited Shipments?
- ❖ What is your average volume per week?
- ❖ And you're responsible for paying for the shipping?

Re-Qualifying Volume:

- ❖ How many <u>Truckload</u> shipments are you responsible for each week (inbound, outbound or 3rd party)?
- ❖ How many Expedited shipments are you responsible for each week (inbound, outbound or 3rd party)?
- ❖ How many TL or Expedited shipments did you ship (receive and/or pay for) last week?
- ❖ How many TL or Expedited did you ship (receive and/or pay for) the week before that?
- ❖ Would it be fair to say that is your average (average of the two responses)?

Seasonal business:

- ❖ When does your season begin and end?
- ❖ What is your average weekly volume during the season?
- ❖ What is your total volume typically during the season?
- ❖ What was your total volume last season?

Project Business:

- ❖ What does a typical project entail (shipment volume)?
- ❖ How often do you have projects?
- ❖ How many projects did you have last week? Month? Year?
- ❖ Would it be fair to say that your annual shipment volume is *x* (average or multiple of history)?

On-Demand:

- ❖ What are the circumstances that cause you to need to ship or receive Expedite?
- ❖ How often does that occur?
- ❖ Are these recurring situations?

Qualified Prospect: Warm call prospects to determine if the business is a fit for Beemac Logistics services

- ❖ Re-Qualified Decision Maker(s) and Influencer(s)
- ❖ Re-Qualified weekly shipping volume by mode
- ❖ Re-Qualified prospect pays for the shipping
- ❖ Re-Qualified primary mode is TL or Expedite
- ❖ Identified shipping lanes, regions, locations
- ❖ Identified incumbent providers, brokers, etc.
- ❖ Identified mode(s) and equipment used
- ❖ Identified commodity and value*
- ❖ Identified special requirements, equipment or services
- ❖ Identified quoting, booking and selection process

REQUALIFYING:

At each stage of the sale you will have opportunities to confirm information received in prior calls. Never assume that the information you received earlier in the process is accurate. The gatekeeper may not have the same exposure as the Initial Shipping Contact. The Initial Shipping Contact may not have the same scope as the Primary Shipping Contact. The Primary Shipping Contact may not understand things in the same context as the Decision Maker. As the sale progresses, you:
- ❖ Are often speaking with a different person

❖ Learn new information which can attest to the accuracy of prior information

REQUALIFIED DECISION MAKER(S) & INFLUENCER(S)

Earlier, you spoke with whoever answered the phone and likely someone in shipping. You may have contacted the owner or other executives. If speaking with the owner, it's not necessary to requalify. However, there will be a great number of times where you are directed to speak with someone else – perhaps another Executive, a Director, or someone in Management. Unless directed by the Business Owner themselves, it's critical to verify the information given to us prior. One of the biggest ways to waste time and get stuck on the 20-yard line is by investing time selling to a non-decision maker.

In most cases, there are multiple contacts associated with the shipping processes. Most may claim to be the "decision maker," but there is rarely more than one true DM and it's our job to find them.

- ❖ **Decision Maker**
- ❖ **Influencer**
- ❖ **Sponsor**
- ❖ **User**
- ❖ **Detractor**

Decision Maker

Our target decision maker has many titles. Ultimately, this person will have the authority to make wholesale changes to their business processes. The Decision Maker has oversight over multiple departments and how they interact with the shipping department. They will have access to information and are able to provide invoices or data. They have autonomy to make decisions on behalf of the company, can sign credit applications, contracts, and don't need anyone else's permission to do so. The decision maker is the person who best sees the benefit to their company.

The employee who can decide which truck to ship with does not make them a decision maker. The decision maker is the person who can order employees to stop using the competition and to begin using Beemac Logistics. The decision maker likely made the prior decisions to use their current providers and implemented the current process. The decision maker may not be versed in transportation terminology but has full knowledge of how shipping affects customer service, finance, technology and sales.

The decision maker is most commonly the Business Owner, a C-Level Executive, a VP or Director.

The true DM has:

Financial Capacity – ability to commit funds
Authority – authority to make a wholesale decision
Interest – they express interest in our service offering
Need – they have a pain point or goal they recognize the need to address
Timing – they share the same decision-making time frame as us

Influencer

An influencer is typically a higher-level employee who is involved in the decision-making process but does not make autonomous final decisions. Many influencers have the same oversight as Decision makers and may make several business decisions daily, but to make wholesale change requires someone else to sign off. Influencers will also can understand value creation and how it benefits the company. Even if not directly involved with the decision-making process, influencers usually have special knowledge into the shipping and business processes and can help to connect you with executive buyers.

Influencers are most commonly VP's, Directors, managers or supervisors.

Sponsor

A sponsor is like an Influencer, only the sponsor has no decision-making ability and likely does not pretend to. A sponsor could be almost any level from a C-Level to an end-user. A sponsor is an employee who is familiar with the shipping processes, has access to the relevant executives, and serves as a champion for your cause. It's helpful to establish contact with a sponsor to aid in effective communication. Sponsors typically exist in much larger accounts. It's important to remember that a sponsor is your cheerleader but does not directly make or influence decisions. It's a dangerous pitfall to put decision making responsibility on your sponsor. The job of selling remains ours.

User

Users are typically ground level employees who execute business processes and use the company's established vendors. Users may have autonomy over which carriers to use but are not necessarily responsible for having procured the carriers and established the current shipping processes. For transactional accounts, a user is fine if they can pick which carrier to give freight to. However, Users typically do not have oversight outside of their own silo, hindering our ability to provide value to the account, forever putting it at-risk.

Users usually do not have access to invoices.
Users cannot sign credit applications.
Users are typically not familiar with company billing requirements.
Users are typically not familiar with KPI's for customer service, sales, or the company goals.

Users are best used as a source for information and developing a working relationship with them will be crucial – after successfully selling to a decision maker.

Users are typically shipping managers, office managers, supervisors, clerks or other front-line employees.

Detractors

Detractors can be anyone involved in the decision making or shipping process who does not want to implement your solution. Most detractors are users or lower level influencers. This is another reason why it is so critical not to sell to them as they are the most likely to put up roadblocks in your process. Detractors do not always show themselves at the beginning of a process. The detractors will likely be the employees who are being introduced to a new process and to use a new service. Since many people don't like change, the detractor will attempt to be subversive at every turn. It is because of detractors that we must emphasize the need to re-qualify the decision maker. Since detractors are not involved in the decision-making process and do not have oversight to other departments, they will be the one to blame Beemac Logistics for anything non-satisfactory.

How to mitigate the influence of detractors?

Sell solutions, not shipments. When we sell transactions, we fail to create value at an executive level. When something goes wrong, it will be easy for detractors to place blame on Beemac Logistics and since we failed to create value, that blame may outweigh any promised benefits.

REQUALIFIED SHIPPING VOLUME BY MODE

Never assume that the information previously provided was accurate. If you're engaging with a new contact or continuing a conversation with the previous contact, it's critical to confirm shipping volume by mode

specifically. This answer will likely change at several times throughout the sales process. The initial contact will provide a number. Upon qualifying, we narrow down that number. During the opportunity stage, that number gets even more specific. Upon commitment the ink begins to dry. Once a customer, we see that number manifest and even then, we must continue to develop the relationship.

Requalifying the shipping volume is critical:

- ❖ To correctly prioritize your sales activity
- ❖ To effectively provide involve management in top opportunities
- ❖ To properly forecast your sales pipeline
- ❖ To ensure prioritizing correctly
- ❖ To determine the best sales approach

By repeating and rephrasing this question throughout the process, you will identify when:

- ❖ A larger portion of their shipping volume is paid for by customers or vendors than originally believed
- ❖ What we believed was LTL via UPS Freight turns out to be small parcel via UPS parcel
- ❖ There is inbound or 3rd party shipments we didn't learn about the first time
- ❖ They have additional locations or are adding new vendors
- ❖ They over or underestimate their volume

IDENTIFIED SHIPPING LANES, REGIONS AND/OR LOCATIONS

Shipping lanes

Lanes are a commonly used Truckload term which can also be deceiving. Lanes refer specifically to the zip code pair a shipment travels (or city to city). When qualifying a potential truckload prospect, it's critical to identify common lanes to better assess the potential of the account.

For example, a customer commonly shipping from Miami to Atlanta may be richer in opportunity than a customer commonly shipping from Illinois to Miami. If most of the lanes a customer ships are areas where we are weaker in capacity, we will have to review the opportunity further before proceeding. If most of the lanes a customer ships are areas where we are stronger in capacity, we will want to raise the priority of the prospect.

Lanes do not directly reflect volume. A customer may have 20 lanes but only ships to them each once or twice a year. Inversely, a customer may ship 20-30 truckloads per week and never on a consistent lane.

When there are consistent lanes, we are more likely to create value by procuring only a certain number of carriers which can increase the consistency and quality of service, control the price and be easier to manage. When there is no consistency in the lanes, we may be able to create value by transferring the procurement efforts to our team, but that hinders the value it provides Beemac Logistics, so we will need to look at other aspects of the account before making a determination.

Regions

If there is no consistency or available information about the lanes, there may be consistency in the regions that the customer operates in. If the customer operates primarily in the regions where our capacity is strong, we should feel better about the prospect. If the customer operates primarily where our capacity is weak, we should proceed with caution.

This is true for LTL as well. Whereas coverage and capacity are not the issue with LTL, cost competitiveness is. If the customer operates primarily in the regions where our LTL pricing is more competitive, we should feel better about the prospect. If the customer operates primarily in the regions where our LTL pricing is not as competitive, we should look for additional value-adds or proceed with caution.

Locations can apply to both. Knowing where the manufacturing facilities are located can give us insight on how to proceed with the account.

IDENTIFIED INCUMBENT PROVIDERS, BROKERS, ETC.

When initially identifying whether to pursue, it didn't matter who the company was using. In order to effectively qualify the account, however, it is critical in order to:

❖ Ensure there is no channel conflict or back solicitation issues
❖ Get a little more insight into the customers current situation
❖ Tailor your sales approach to the strengths and weaknesses of your competition

Current Situation

If we identify that the customer is only using one provider, we may begin to make inferences to the strengths and weaknesses of their current situation and set up our line of questioning when investigating needs. Is there current set up effective in handling their shipping operation?
If we identify that the customer is using multiple asset-based providers, we may begin to make inferences into the strengths and weaknesses of their current situation and set up our line of questioning when investigating needs. *Why should one customer have so many different vendors just to solve one business problem?*

If they are using a 3PL, we should assume there are reasons and again, can begin to make inferences as to why. Remember Beemac is a full-service logistics provider and offers 3PL and managed transportation services. If they are using multiple 3PL's, we know that their process is wholly inefficient, and we can tailor our line of questioning when investigating needs that support that claim.

Sell against the competition

To effectively create enough value to close an account, you need to create more value than their current situation. Therefore, you need to be able to identify what is the value their current provider is creating.

By identifying who the incumbent providers are, you can use your experience or research the companies to identify potential strengths and weaknesses. You can therefore tailor your sales approach to the specific competitors' strengths and weaknesses.

IDENTIFIED MODE(S) & EQUIPMENT USED

Although we identified mode on our initial call, now is our opportunity to get more specific. By qualifying the specific modes and equipment used, we can better determine whether the prospect fits our model.

Truckload

❖ **Dry Van**
❖ **Flatbed**
❖ **Reefer**
❖ Straight Truck
❖ Step deck

- ❖ Conestoga
- ❖ RGN
- ❖ Lowboy
- ❖ Vented Van
- ❖ Container
- ❖ Hopper
- ❖ Dump
- ❖ Logger
- ❖ Tanker
- ❖ Auto carrier
- ❖ Boat carrier
- ❖ Dolly
- ❖ Heavy Haulers
- ❖ Piggyback
- ❖ Power only

Truckload shipping services typically include the driver driving – and that's it. If the customer consistently needs things like lift gates, driver assist, or anything outside of the driver driving, we will need to review the prospect before proceeding.

While this predominantly refers to full truckload, the concept is the same for LTL. We target standard LTL. We offer a variety of services to support customers when they have different needs. However, we are qualifying accounts that will be the best fit for Beemac Logistics.

A customer who only ships to residences may be more difficult to service and we will need to review the opportunity. The same is true if a customer were only to deliver in major cities. If they require lift gates or air ride on all their shipments, it reduces the number of available trucks.

What other variations of equipment type might they need that could change our ability to successfully service the account?

IDENTIFIED COMMODITY & VALUE

This is critical piece of information that is far too commonly overlooked. There are three components to identify:

- ❖ What is the commodity
- ❖ What is the insurance value?
- ❖ How is the product valued by the customer?

Commodity

It's reasonable to believe that the commodity isn't relevant. The truck travels the same number of miles over the same highway if the product is leather products or hay. The customer is responsible for packaging, loading and unloading so it shouldn't matter if it's pallets of computer equipment or lumber. LTL pricing takes into consideration the product and its density while truckload charges per mile whether you're hauling 40,000 lbs. of apparel or a single feather. So why does it matter?

- ❖ The way a commodity is valued by the customer affects how they value the way it's transported
- ❖ Different commodities travel via different modes in different regions

❖ Different commodities have different loading and unloading processes

Example: Lumber wholesalers generally only return 1.74% net profit. That does not leave a lot of room for discretionary spending on things such as transportation. The product delivery is rarely time sensitive. The product itself is rarely subject to claims and damage. The delivery locations and even the customers themselves are not usually the same each time. Therefore, where can we provide positive value? Value = Benefit – cost.

❖ Transit time & responsiveness isn't important
❖ Reliability and safety aren't important
❖ Price is all that's important

Because price is the primary factor in choosing a carrier, the customer isn't picky who moves it or how they procure the vendor. Typically, they send out BCC Emails to anyone and everyone who's ever provided it to them and ask for a quote. This list includes competing brokers, the same asset-based carriers used by the brokers, and probably other Beemac Logistics reps as well. There's simply no money to be made.
Even if we were to be awarded the shipment by being the lowest quote, we now must cover the load.

So, covering the load will be difficult due to capacity and nearly impossible since you can't pay a lot of money to the truck. This is generally true for other raw materials as well. Use caution when qualifying and identifying these types of commodities.

The type of product can also affect loading and unloading time. Drivers get paid to drive. Even though they will charge for detention, it's not a comparable amount to what they make driving. Long detentions make certain customers less attractive to carriers, decreasing our ability to service the account. With little profit to play with, we lack the ability to make the load more attractive to carriers, often resulting in a failure to cover, rolled loads, dropped trucks, financial losses and unhappy, lost customers.

Scrap metals and recycling are another example. Both have very tight profit margins. Both are very hard to damage and are rarely time sensitive. However, these two commodities often travel in dry van. So why aren't they more attractive? Think about the product itself and picture it in a truck. Its loosely secured junk being jammed into a trailer and transported on the highway. The product will damage the inside of the truck, making it less appealing to the truck driver. Commodities like manure and even hay have similar issues. Truck drivers aren't eager to transport a truck that will require them to thoroughly clean their truck before being available to pick up another load. And again, with tight profit margins, it is hard to make these more appealing or to make any money.

Many products require special packaging or handling. Many products have common issues to transport. By familiarizing yourself with your customers commodities will allow you to become an expert in their business as well.

Insurance Value

Often, this will not be relevant. Trucking companies will commonly provide $100k of cargo liability. In most cases, this is enough. By identifying the insurance value of the commodity, we will find prospects who require a much greater amount. This will allow us to tailor our sales approach or determine they may not be a fit.

Inversely, for LTL shipping, this will allow us to identify other potential value adds. Whereas LTL carriers provide limits of liability, they rarely cover the replacement cost of the product and have several different rules that mitigate their exposure. When customers shipping LTL have high valued products, it's an opportunity for us to provide additional insurance as a value add. It also opens doors for us to investigate their packaging, loading and unloading processes as potential value adds.

The Product Value

Items such as lumber, hay, recyclables, scrap and salvage typically do not have much profit baked in, making it harder for us to create value for the customer and make a profit for Beemac Logistics. This is generally the case, but not necessarily true across the board, so it's imperative to investigate. Inversely, there are many commodities that come at a high value. Office & computer equipment for example, likely prioritizes OTIF above shipping cost. Manufacturers of leather products are likely more concerned with reliability and theft than they are shipping costs. A larger company may be more concerned with how we can provide better visibility into their own processes than they are the shipping cost itself. But again, that is not always the case. What we want to determine here is how a customer sells their product and makes money.

IDENTIFIED SPECIAL REQUIREMENTS, EQUIPMENT OR SERVICES

Primary reasons of false starts of first shipments-gone-wrong are often the biproduct of failing to identify any special requirements, equipment or services needed. Never rely on the customer to proactively inform us of these things. They do the same thing day in and day out, therefore critical requirements and services may not seem like a big deal to them – until they don't have them. Increasing sales effectiveness requires doing your homework before selling solutions!

A special requirement does not automatically preclude us from doing business with a customer. By diving into this line of questioning, we will accomplish one of two things:

❖ Identify whether the customer is a fit for Beemac Logistics
❖ Identify the important details required to successfully service the customer

For example, a customer who ships truckloads to grocery warehouses will need appointments to be set. By itself this is not a problem. However, we will need to make sure we are making enough money to justify the cost of the manual work required to set the appointments. This will require us to establish an SOP and manage the process to ensure mistakes aren't made that could jeopardize our relationship. Additionally, appointments are not always as easy as calling an 800#. Sometimes there is a process. Sometimes the warehouse may not respond for hours or even days. Sometimes there isn't availability for days or weeks, requiring us to take extra steps of communicating with the customer and coming up with a solution. These are all things that must be considered.

Some customers who ship truckloads from 3rd parties or vendors may need someone to call ahead and get the shipment information and product specification from the vendor themselves. This is a special requirement. We will then need to determine if there is enough value for Beemac Logistics to provide such a service, enough value to the customer to get them to change their process or disengage from the account.

If their LTL shipments require lift gate it should not be a problem. However, if ALL their LTL shipments require a liftgate we may need to further investigate the serviceability of the account. Not all LTL trucks have lift gates. Since LTL carriers choose delivery routes that are the most efficient, lift gate deliveries could incur delays. Unless the customer is already accustomed to this, we may need to consider the manual effort involved in proactively tracing and rerouting shipments. We may need to consider the satisfaction of the customer and that they may seek credits for additional transit days, etc.

IDENTIFIED QUOTING, BOOKING & SELECTION PROCESS

The final piece to qualifying prospects is also the first piece of your sales call. Identifying the prospects quoting, booking & selection process will help you to determine if they are a fit for Beemac Logistics and give you the foundation to establish your next line of questioning.

"Walk me through your current process?"

Often, this question may be enough to get the details required to move forward. However, it is likely you will need to ask to follow up questions to fill in the blanks. Your primary objectives with this point are:

- ❖ Determine if the processes used by the prospect are a fit for Beemac Logistics
- ❖ Establish the foundation for your need's investigation

What is the process from when an order is placed to the shipping department until a carrier leaves with their freight? (In *Needs Investigation*, we will need to uncover the process from the moment they engage with one of their customers until they close their books)

- ❖ How do they request, receive and review quotes?
- ❖ How do they select their carrier?
- ❖ How do they book their carrier, receive paperwork and complete their transaction?

Here we begin to uncover how manual their process is:

- ❖ Do they email multiple reps at multiple providers for quotes?
- ❖ Do they cull through all their emails to compare quotes?
- ❖ Do they wait for all quotes to come in and review them, or do they select the first one they receive?
- ❖ What are their expectations on response time?
- ❖ How much lead time are they giving their providers?
- ❖ Do they need internal approval before selecting a provider?
- ❖ In order to book a shipment, do they respond via email?
- ❖ Do they respond to all their reps who did not win the load?
- ❖ How do they produce their BOL?
- ❖ Do they produce their own or wait for a sales rep to send it to them?
- ❖ How do they store this information?

Or here we begin to see how they utilize automation:

- ❖ Do they log onto a TMS? Just one, or for each provider?
- ❖ Do they have an internal order management system?
- ❖ Are there customer requirements for their shipments?

Or how outdated their process is:

- ❖ Do they use a physical transit map?
- ❖ Do they "know who has the cheapest rates?"
- ❖ Do they even quote their shipments or just assume their pricing program is good?

Anyone of these scenarios has advantages and disadvantages dependent on their business needs. Manual-process customers may be ideal prospects because there is more that we can offer them but getting them to uproot their processes may prove to be more difficult. Customers using a TMS should be an easier transition to another TMS, however there may be less value we can create. Those with no real process at all may also be an ideal situation, except that the person using such antiquated methods may be unwilling to do something new.

Once all this information is attained, review and analyzed, we can determine if Beemac Logistics is potentially a fit to fill the customers' needs. If it's decided that the account is a Qualified Prospect, we begin our needs investigation to identify the root of their pain points.

That – is what we intend to find out in the next stage.

OVERCOMING OBJECTIONS

In this section we review the various responses you will encounter from your initial contact and how to respond. You will come across all sorts of personalities under very different circumstances. How you react to the various impediments will not only determine the success or failure of the call you're on but can dictate how the next several calls will go.

Objections vs. Obstructions

Definition of Objection: The action of challenging or disagreeing with something. A reason or argument presented in opposition. An *objection* is a way of saying "No!" to something.

Definition of Obstruction: A thing that impedes or prevents passage or progress. Something that gets in the way.

What is the difference?

An obstruction is something that is seemingly 'in the way.' It may or may not be deliberate nor does it mean that something is unpassable. Whereas an objection is a deliberate action taken to impede process. Obstructions do not typically have motives or agendas. They're just there. Objections are arguments made specifically to impede your progress.

Why is this important to know?

Because they sound an awful lot alike. An example:

Obstruction: "We only work directly with Coyote."

Objection: "We *will* only work directly with Coyote."

One statement is a piece of information to be collected. In fact, it's the information that we asked for. The other statement is a decision that's been made and it's ours to overcome. Objections require us to assess, isolate, reframe and overcome. Obstructions only encourage us to ask the next question.

Great. So why is this important to know?

To be effective in your calls, it's important to recognize the distinction between an obstruction and an objection so you can craft the proper response. Failure to recognize that difference can quickly turn easy cold calls into brutal, unnecessary arguments.

How do I tell the difference?

First, listen.

Second, most first objections are simple, knee jerk reactions to a salesperson. In other words, ignore the first objection and attempt to move forward. If unsuccessful, ask for clarification of their objection (assess). What is the true nature of this objection? In other words, is the person you're speaking with qualified or empowered to make this decision? Are they simply following orders? Is there in fact a valid business reason for this objection that suggests you may waste your time by trying to move forward?

"So, it's the current company policy to only ship directly with Coyote because you negotiated your lanes, is that right? That makes sense."

Third, when presented with a true objection, attempt to isolate it. In other words, is this their only objection? Will overcoming this objection only lead to another and another?

"So, other than the standing policy to only ship with Coyote, is there any other reason why you wouldn't want to review your supply chain needs with me?"

Fourth, reframe the objection. In other words, put the objection into your own words. Words that are more favorable to your own position.

"Ok, so what you're really saying is that you want to guarantee competitive rates while ensuring capacity, is that right?"

Finally, overcome!

"That's precisely why we should review your current set up. Beemac Logistics has exclusive access to over 500 Beemac assets as well as a comprehensive network of over 20,000 partner carriers to better reduce and control pricing while ensuring capacity. Let's review."

So, what's the proper response to the obstruction?

Excellent, who are you currently using?

Common Obstructions:

❖ We use another asset-based company
❖ We're in a contract
❖ Our shipments are customer routed
❖ We never use Expedited
❖ We use local carriers
❖ We don't use asset-only
❖ We don't use any brokers / 3PL's
❖ We have an FAK (pallet rates, minimums, great rates, etc.) with our carrier
❖ We aren't adding new carriers
❖ Nobody can touch our rates

Definition of Gatekeeper: an attendant at a gate who is employed to control who goes through it. a person or thing that controls access to something. A person with the authority or ability to control access to a decision maker or to certain information.

So, who is the Gatekeeper?

❖ Receptionist?
❖ Shipping Manager?
❖ Shipping employee?
❖ Office Employee?

There can be and usually are multiple gatekeepers in a company. We will refer to anyone who can control access to decision makers or to specific information as a gatekeeper.

Some people are paid to protect the time of executives and to control the flow of information. Some people may not have been granted the authority to do so but do so anyways whether it be to protect an agenda,

protect their own time, and sometimes just to be difficult. But here's what a gatekeeper isn't: The Decision Maker.

How do I respond? Negative responses from a Gatekeeper typically fall into two categories. Is it a *WHY QUESTION* or is it a *NO STATEMENT*?

WHY QUESTIONS:

- ❖ What's this regarding?
- ❖ Are they expecting your call?
- ❖ Is this a sales call?
- ❖ Who is Beemac Logistics?
- ❖ Is that regarding *Shipping*?

NO STATEMENTS:

- ❖ We don't accept sales calls.
- ❖ They're busy now.
- ❖ We're all set with who we use.
- ❖ We get calls from people like you every day.
- ❖ We aren't interested.
- ❖ I can put you through to Voicemail.

RESPONSES TO "WHY" QUESTIONS:

Tip: Respond to a why question & immediately repeat your call to action. Dead air only welcomes more obstructions & objections.

- ❖ Please let them know this is [*First & Last* Name] calling. Thanks!
- ❖ They'll recognize the name. Please let them know its [*First & Last* Name] calling. Thanks!
- ❖ This is regarding an introduction….
- ❖ Logistics….
- ❖ Transportation….
- ❖ ELD Logs….
- ❖ OTIF Delivery Issues….
- ❖ Driver capacity….
- ❖ Absolutely!
- ❖ I'm not selling, I'm making an introduction…
- ❖ Of course not!

RESPONSES TO "NO" STATEMENTS:

- ❖ Great! I hate salespeople. Please let them know this is [*First & Last* Name] calling. Thanks!
- ❖ I understand their time is valuable. I'm simply calling to introduce myself….
- ❖ I'm trying to set up a meeting with them, can you set that up or do I need to speak to them directly?
- ❖ No problem, I'm simply calling to see when I can find time in their schedule….
- ❖ I can appreciate that….
- ❖ No problem. I'm just calling to make an introduction….
- ❖ That's EXACTLY why I'm calling….
- ❖ I haven't given you anything to be all set with….
- ❖ There's a lot of opportunity out there….

SITUATIONAL RESPONSES:

Although most initial obstructions or objections from a GK are knee-jerk and don't require a thought-provoking response, it's important to listen for real obstructions or objections. General rule of thumb is that if you are given *3 different objections or the same objection twice*, you should consider a different approach.

Situational responses can come as either statements or questions and can be either an obstruction or an objection – sometimes both. There are five main types:

1) The contact you're asking for really is not available
2) The GK is genuinely trying to understand why you are calling so they can properly assist your call
3) Request to leave information
4) The GK has no knowledge
5) The GK is trying to confirm this is a sales call so they can properly dispose of your call

Not available?
❖ They aren't here
❖ They can't talk now
❖ I'm not sure where they are
❖ You can leave a message
❖ Would you like their VM?

In each instance, remember your primary objective is to get enough information to determine if they are worth pursuing. In these cases, yes, you want that voicemail – but not yet.

"Before you transfer me…"

❖ Do you ship Full Truckload or Expedited Shipments?
❖ Do you receive Full Truckload or Expedited Shipments?
❖ What is your average volume per week?
❖ And you're responsible for paying for the shipping?

Why are you calling?

❖ What is this regarding?
❖ Where are you calling from?
❖ Logistics, what is that?
❖ Is this about shipping?

In each instance, remember your primary objective is to get enough information to determine if they are worth pursuing. Brush by knee-jerk responses but respond to genuine inquiries.

"Yes, we help businesses deliver expectations by providing personal, concierge level service our customers rely on. I'm trying to introduce myself to the appropriate person to find out if your company even uses those types of services."

Leave me your information

Often, this is a blow off. Regardless, it's the hand we have been dealt. Welcome the opportunity to leave or send information, but remember your primary objective is to get enough information to determine if they are worth pursuing.

"Of course, but to make sure I send the proper information…"

- ❖ Do you ship Full Truckload, LTL or Expedited Shipments?
- ❖ Do you receive Full Truckload, LTL or Expedited Shipments?
- ❖ What is your average volume per week?
- ❖ And you're responsible for paying for the shipping?

No knowledge

Often, the GK will not have any knowledge of the shipping processes, volumes or vendors. Still use this opportunity to collect relevant information.

"Ok that's fair. While I have you, could you help me a little on…"

- ❖ Full name of DM
- ❖ Title of DM
- ❖ DM Email
- ❖ Owner Full name
- ❖ Product information

Screening a sales call?

Take your shot! You made the effort to make the call, make the effort to overcome the objection. There is nothing to lose.

Past that, take the loss gracefully. The other person is only doing their job. They will often respond with vague comments that sound like a decision, such as:

- ❖ We're all set
- ❖ We're not interested
- ❖ It's handled

After taking your shot to overcome, it's ok to disengage. There's no point in arguing a decision with a non-decision maker. Do your best to secure any piece of useful information, and then either disengage or prepare to be hung up on.

Last ditch effort:
"Would you help me out?"

Once hung up on, log your call and put the account back into the queue. If you have no qualifying information, call back when the accounts come up again. If you have any relevant information, continue to engage and pursue.

- ❖ Note the time of your call and call at a different time next time.
- ❖ Review your notes from the call – who did you speak with? What did you say? Be prepared for the objection and try a different response.
- ❖ Experiment! The only people who know what you're supposed to say are in this room. Be ready with your go-to responses but look for opportunities to push your comfort zone and try new things in new scenarios.

Referred to Corporate Office

Sometimes we end up calling a branch office and are directed to Corporate.

- ❖ Be sure to get the full name & title of who you are being referred to
- ❖ Attempt to get a direct contact number & email address
- ❖ Get prospecting information!

OVERCOMING QUALIFYING OBJECTIONS

The primary difference between overcoming Gatekeeper objections and overcoming qualifying objections is the source. GK and initial contacts rarely have decision making authority or influence. However, while the PSC may not have decision making authority, it is likely that they can influence the process.

While it's true that qualifying objections are just as likely to be simple obstructions, we need to consider the source and the context before making that assumption. Disregard a legitimate objection from an influencer and the sale is not likely to progress.

Objectives when speaking to (PSC):

❖ Clarify information and engage, not to get past them
❖ Understand objections vs. obstructions
❖ Understand which objections are buying signals
❖ Understand which objections don't require snappy comebacks, but rather require a process to overcome

Types of objections:

❖ No trust
❖ No need (or no recognition of need)
❖ No time
❖ No urgency
❖ No (not enough) money

Most objections boil down to the buyer's:

❖ Time (T)
❖ Money (M)
❖ Goals (G)

MOST COMMON:

❖ All Set/Not interested
❖ Happy with who we use
❖ We have the best rates
❖ We won't use brokers because I:
  o Get better rates
  o Don't want to give up control
  o Can do it better myself
  o Had a bad experience
  o Don't want to deal with a middleman

Common misconceptions:

❖ Working with a 3PL is an additional cost
❖ Working with a 3PL will disrupt other existing relationships
❖ Working with a 3PL eliminates control over their shipping process
❖ Working with a 3PL is an extra step/layer
❖ Working with a 3PL could cost me my job

o **Wait, that one might be real…**

Remember that effectively partnering with a 3PL means outsourcing parts or all the supply chain process to the 3PL. This could improve the jobs of the shipping employees or it could adversely affect their employment. While not for us to decide, we should remain both cognizant and sensitive to this possibility in our communications.

Remember your objective is not to sell them, it's to qualify them. You only need to get information from them. You may not need them to be a sponsor, but you do need to avoid making them a detractor.

OVERCOMING QUALIFYING OBJECTIONS

❖ Listen
❖ Assess
❖ Isolate
❖ Reframe
❖ Overcome

Listen: Welcome the objection. Don't be afraid. An objection is the prospect conveying their concerns, needs, wants, and even providing insight into their buying criteria. Listen fully to the objection – don't interrupt. Resist the urge to play defense. Take notes!

Assess: Getting to the root of the true objection is critical throughout the sale. Rooting out objections now may reduce buying objections later. After listening to the objection by the prospect, ask permission to learn more about it. Restate the issue. Ask questions to clarify. Without sounding too needy, inquisitively ask "why" until you are clear on what the cause of their reluctance is. Once you feel you understand it, you need to isolate it before crafting your response.

Isolate: More of than not, the first objection is always a knee jerk reaction – but there may be a list of them lurking behind. Once assessing the nature of the objection, we need to ensure it is the true and final objection before moving on.

"Other than [your objection], what else would be in the way of us moving forward?"

Reframe: Repeat the objection back to the prospect in a more favorable light. Reframe a "not interested" to "Ok, what you're telling me that your current provider is getting the job done, is that right?"

Overcome: Now that you understand the objection and its importance to the prospect, you need to respond. Responses may be just be simple comebacks to overcome basic pushback, but they may also require a process. You may need to take the objection at face value and then decide a plan to learn more about it, develop a strategy to satisfy the customer need and of course to present it to them. There's nothing wrong with showing a customer that you're listening to them.

Once receiving confirmation that you successfully overcame the objection, ask for permission to continue. Do not pass go without asking for permission. There may be other objections not yet discussed and if you mow past them you will end up finding out the hard way after wasting all your time working the sales process.

NOT INTERESTED

"Okay, that's fair. **Before I let you go**, I haven't really proposed anything. I am curious to what I could have said that might have interested you."

[*Nothing, really.*]

"Obviously this is an area of importance to you, so I'm guessing you're just not interested in discussing it at this time. Is that right?"

[*Yes, that's right.*]

WE GET THE BEST RATES

"That's good to hear, I'm not suggesting you change anything…"

"That's good to hear. Most people I talk to complain about their rates. Besides getting the best pricing, what are your carriers doing for you?"

"I'm not selling anything, just trying to determine a fit…"

"So, rates are important to you?"

"When was the last time you reviewed?"

"How about I submit a proposal, just to keep the other guys honest?"

WE DON'T USE BROKERS BECAUSE I:

- ❖ Get better rates
- ❖ Don't want to give up control
- ❖ Can do it better myself
- ❖ Had a bad experience
- ❖ Don't want to use a middleman

"So, hitting your shipping budget is important to you?"

"I see, you want to make sure you have full visibility over the shipping process, decisions and outcomes? That makes sense. I'm curious, how do you accomplish that now?"

"What tools do your current providers give you to maintain oversight and control?"

"What systems do you have in place to choose the carriers you want?"

"What process do you have in place to ensure your decisions are carried out in your absence?"

HAPPY WITH INCUMBENT

"Okay, that's fair. **Before I let you go**, I'm curious, what would you say makes that relationship work so well for you?"

Before I let you go…

I'm curious…

What topics does your current provider usually cover in their quarterly business reviews with you?

[*We don't have business reviews by them*]

"Would you be interested to know what we cover in ours?"

"I'd be happy to lend a second set of eyes…"

IDENTIFYING & ENGAGING DECISION MAKERS

<u>Transition:</u>

Now that we've gathered enough qualifying information to determine a fit for Beemac Logistics, it's time to transition into a sales conversation.

❖ The account is not a fit for Beemac Logistics and it's time to disengage
  o You are not speaking with the DM
  o You are currently speaking with the DM
❖ The account is a fit and you will need to contact the Decision Maker
❖ The account is a fit and you might be speaking to the Decision Maker
❖ The account is a fit and you are currently talking to the Decision Maker

<u>The account is not a fit:</u>

You are not speaking with the DM: "Thanks for the information and your time. It seems like you have a lot going for you. That's more than most people we speak to. If your needs are ever to change, please consider contacting me. Who should I send my contact info to?"

You are speaking with the DM: "Thank you for the information and your time. It seems like you have a lot going on for you. That's more than most people we speak to. If your needs are ever to change, please consider contacting me. What's the best contact for you?"

Log your call and unqualify the account.

<u>The account is qualified:</u>

You are not speaking with the DM: "Thank you for your time and the information! Based on what you told me, I believe our companies would be a good match. If I had some questions regarding how shipping effects other business areas, who could you direct me to?

OR –

"Thank you for your time and information! Based on what you told me, I believe our companies would be a good match. If I had some thoughts to share on process improvements, how would you suggest I go about that? Who could you direct me to?"

You are speaking to the DM: "Awesome, [*PSC First name*]! Based on what you told me, I believe our companies would be a good fit for one another. Now that I've learned about your shipping process, I'd like to learn a little more about your business itself. What's the best way to go about that?"

"Awesome, [*DM First Name*]! Based on what you told me, I believe our companies would be a good fit for each other. If I had some thoughts to share with you on how to improve your process, how would you suggest I go about that?"

You might be speaking to the DM:

"Awesome, [*PSC First Name*]! From what I can tell, there's a compelling business reason to move the discussion forward. If we were to, what would be the process on your end?"

"…If I had some suggestions on process improvements, who would be the best person to direct those to?"

"…I think this might require further investigation. I'd like to engage in further discussion. What would be the process on your end?"

As the size of the account increases, so does the likelihood that there are business problems they would like to solve.

While cold calls are an interruption and are not the favorite activity of salespeople, it is still the most common way to succeed in creating new conversations.

In a study by the Aberdeen Group 42% of Executive Buyers responded that they accept cold calls.

Driving factors for why they would take a call include:

❖ The Value offered by the salesperson
❖ Introduction to Best Practices
❖ Sharing research findings
❖ Discussion with experts
❖ Event invitations

In the same study, Executive Buyers cited these specific reasons for having accepted cold calls:

❖ 93%   The Decision Maker recognizes they have an explicit need
❖ 82%   The salesperson provided value on the call
❖ 73%   The salesperson engaged them peer to peer
❖ 68%   Received information prior to the call
❖ 64%   Heard of the company before
❖ 62%   Didn't feel like they were being sold to
❖ 52%   Dissatisfied with current provider or situation

Explicit Need

Remember that one of the primary factors in determining a prospect list are companies most likely to have a need

Presented Value on the call

You only have a few seconds to present value. You can't explain how you will provide value to their company in just a few seconds, so you need them to believe they will find value in simply taking the call.

Engaged as a peer

If you feel like you're intruding or are nervous to call on a business owner because you feel you won't be viewed as their peer, you're right, and they won't want to talk to you. Recognize that you are a professional,

you provide a service that benefits other companies, and your time is valuable as well. Decide you are a professional and you will be viewed as such.

<u>Received information prior to the call</u>

As opposed to cold calls where prior research is not a productive use of time and sending information is akin to SPAM, sending specific information to a targeted decision maker can have a positive effect. They are not likely to return or even read your email, but they be more likely to recognize the name and industry when you call.

<u>Targeting the right decision maker</u>

We are going to focus on the Business Owner and Executive Buyers (Owner, C-Level and Director for larger accounts). Succeed at this and you can engage with anyone.

Remember, FAINT.

- ❖ Financial capability
- ❖ Authority to buy
- ❖ Interest
- ❖ Need
- ❖ Timeliness

Salespeople often call too low in an organization resulting in longer sales cycles, less commitments and lower profitability. Call high. It takes more than one or two calls to engage with the right person. Research shows that it takes **an average of 7-8 attempts to contact with Decision Makers.**

THE SCIENCE OF COLD CALLING

10 SALES STATS TO KNOW

1 It takes sales representatives an average of **8 tries** to initially reach leads on the phone. — *InsideSales.com*

2 The best time for cold calling a prospect is **4-5 pm**; the worst is **11 am-2 pm**. — *Kellogg School of Business*

3 **57%** of a potential client's buying journey is finished before speaking with a brand. — *CEB*

4 **80%** of sales require **5 follow-up calls** on average to close new customers/clients. — *The Marketing Donut*

5 The average sales representative **only tries to reach a lead twice** before giving up. — *Sirius Decisions*

6 **50%** of leads who become qualified aren't ready to buy right after qualification. — *Gleanster Research*

7 Nurtured leads produce **20% more sales opps** on average than non-nurtured leads. — *Demand Gen Report*

8 Just **2%** of cold calls to new prospects result in an in-person appointment with a company. — *Leap Job*

9 **93%** of prospects who convert into new business typically do so by the **6th call attempt**. — *Velocify*

10 **80%** of sales calls go to voicemail, and **90%** of those calls to leads are never returned. — *RingLead*

What are different touchpoints we can use to establish contact?

- ❖ Initial cold call
- ❖ Subsequent cold call(s)
- ❖ Voicemail
- ❖ Email
- ❖ Ask for an introduction or referral
- ❖ Send mail (snail mail)
- ❖ Follow them on Twitter
- ❖ Connect with them on LinkedIn
- ❖ Like their Facebook page and message, them
- ❖ What else?

Decision Makers commonly fall into one of the following four categories:

1) They are already looking for a solution and you are likely too late to join the process
2) They don't use your service or don't use it enough to be interested
3) They have a need and have yet to begin looking for a solution – you're in luck!
4) They have a need but are yet to recognize it

Needs are either explicit or implicit. Explicit needs are direct, easily recognizable with understandable implications and solutions. Implicit needs are the foundation of explicit needs. Nearly all our target prospects have implicit needs. That means they may not recognize their problem or may not be aware that it can be solved or improved upon.

- ❖ Often, buyers think that's just how it is.
- ❖ Problems don't exist
- ❖ Problems exist but cannot be solved
- ❖ Problems exist and can be solved but they don't know how to do it
- ❖ Problems exist, can be solved, but are unsure if the benefit will be great enough to do so

Our sales process needs to ultimately focus on a line of questioning that creates a sense of dissatisfaction with their current situation or provider.

Therefore, our cold calls need to be directed at piquing the interest of executive buyers by probing their knowledge of problems and willingness to address them. You need to convey the value in simply taking the call before the value of your service offering.

Various approaches include:

- ❖ Best practices
- ❖ Sharing results
- ❖ Sharing new ideas to address problems

Your Initial Introduction focuses on generating interest in solving a problem or achieving a goal.

Best Practices: Our Initial Benefit statement takes the best practice approach. We have been successful with many other companies to reduce their freight costs and streamline processes. We want to share this best practice with the prospect.

Sharing Results: Like the Best Practices approach, focus on sharing studies, surveys, or other relevant information that might be of interest to a decision maker. It needs to be specific, relevant, easy to understand and simple to communicate. While not always relevance, it can speak to your professionalism and perhaps set up another opportunity to engage.

Sharing New Ideas: This is geared for more tenured sales reps with more industry or business experience and specific insight into the problems that a customer is trying to solve.

Identifying the Decision Maker

Start at the highest level possible

Make at least 7-8 attempts before moving down

Questions to identify the DM:

Are you the person responsible for signing business contracts?

How did you arrive at your previous decision?

Are you the person with ultimate financial authority over the budget (or *shipping budget*)?

Engaging the Decision Maker:

❖ Greeting
❖ Name
❖ ID
❖ Requalify
❖ Purpose
❖ IBS
❖ Call to Action ("CTA")/EOQ

Greeting:	Good morning!
Name:	My name is [*Your First Name*]
ID:	…with Beemac Logistics.
Equal:	Thanks for taking the call. I understand you are the [*Business Owner, CEO, CFO, COO, VP Logistics, Director Transportation, Director of Purchasing, etc.*] is that correct? [*That's correct*]
Purpose:	Excellent! Well [*DM First Name*], the reason for my call is to introduce myself. I spoke with [*PSC First Name*] who walked me through your shipping processes.
IBS:	We help businesses deliver expectations by providing personal, concierge level service our customers rely on. I'd like to share with you how I can help you out as well.
CTA/EOQ:	Would you tell me how your current shipping processes supports your business goals? Would you tell me a little more about your current business challenges? Would you tell me a little more about how shipping effects other business areas? How would you evaluate your current process? What are your expectations of your current process? Where do you see the most significant opportunities for improvement? What visibility do you have into your current processes? What challenges are you currently facing?

FOR TRANSACTIONAL ACCOUNTS:

❖ Greeting
❖ Name
❖ ID
❖ Requalify
❖ Purpose
❖ IBS
❖ Call to Action ("CTA")/EOQ

Greeting:	Good morning!
Name:	My name is [*Your First Name*]

ID:	...with Beemac Logistics.
Equal:	Thanks for taking the call. I understand you're responsible for making the shipping decisions, is that correct?
	[*That's correct*]
Purpose:	Excellent! Well [*DM First Name*], the reason for my call is to introduce myself. I spoke with [*PSC First Name*] who walked me through your shipping processes.
IBS:	We help businesses deliver expectations by providing personal, concierge level service our customers rely on. I'd like to share with you how I can help you out as well.
CTA/EOQ:	How would you evaluate your current process?

OVERCOMING DM OBJECTIONS

The most difficult objection to overcome is getting the DM to engage in the process in the first place.

Remember that all objections are rooted in a lack of time, money, resources or perceived need. Typical objections from the DM are typically focused more on their own involvement in the process, rather than your service itself.

Business Owners most asset is their time. They will instinctively defend their time and push back against you unless you are able to convey the value in speaking with. At this point in your sales process, you are not trying to sell your product, service or benefits but rather the benefits in simply continuing a conversation with you.

1) Lack of interest
2) Lack of perceived need
3) Lack of perceived value

One of the most common and difficult objections to overcome is the Executive Kick Down.

One of the ways to engage the business owner is to pose questions that lower level employees can't answer. Questions about company financials, customer acquisition, sales goals and customer service introduce a new paradigm to the business owner. Your competition is calling them and promising cheaper shipping rates. We are calling and suggesting there are better ways to do business – so let's find out.

<u>Handling the "Kick down" from the Executive</u>

CXO: "I don't know why you'd be calling the CXO… *EMPLOYEE* handles this."

"So, you delegate the functional responsibility to *EMPLOYEE*? That makes sense. The reason I'm calling you, *CXO*, is because we help CXO's to:

- attract and retain loyal customers
- increase their market share
- improve productivity and streamline supply chains
- build a responsive organization
- optimize their KPI's
- improve operational efficiency and visibility
- effectively deploy technology
- maximize scalability
- improve credibility

"So, you delegate the functional responsibility to *EMPLOYEE*? That makes sense. The reason I'm calling you, *CXO*, is because we find that **many companies today are operating in SILOS, and the CXO oversees the whole picture**. What visibility do you currently have over your processes?"

"I understand how you feel, *CXO*. In fact, a lot of other CXO's tell me the same thing. After speaking with me however, some found we were a fit, some others not, but all agreed it was a good use of their time. All I'd like to do is share with you the same opportunity I've given other companies in *X INDUSTRY* and leave it up to you. How would you evaluate your process now?"

"So, you delegate the functional responsibility to *EMPLOYEE*? That makes sense. The reason I'm calling you, *CXO*, is that **we deal with mitigating risk and I believe you would be the most familiar with the risks you face today.** What challenges keep you up at night?"

"So, you delegate the functional responsibility to *EMPLOYEE*? That makes sense. The reason I'm calling you, *CXO*, is that **we help companies avoid disruption and I believe you would be the most familiar with the costs of disruption to your company.** Where do you see the most significant opportunities for improvement?"

"I appreciate that, however our program benefits executives across multiple business areas including finance, technology and operations – and isn't limited to transportation. If you had a magic wand and could fix one problem, what would it be?"

"Ok, great. I did have the chance to speak with *EMPLOYEE* and I thought you might be interested in learning how your current process benchmarks against other like companies in your industry. How would you evaluate your process now?"

"Ok, great. And after I speak with *EMPLOYEE*, why don't we reconnect so that I can share how your processes benchmark against other like companies in your industry?"

"63% of business executives cite logistics as one of their 3 largest expenses. If you're financially interested in your payroll, materials, investment, etc. than why would you not want more oversight to those decisions?"

"What are you doing now to make sure you have the most effective program?"

WE WORK DIRECTLY WITH CARRIERS

Many of our clients had direct carrier relationships. What they found was that by leveraging our volume, technology and expertise, they were able to realize deeper financial benefits as well as improved process efficiency.

WE WON'T USE A 3RD PARTY

- ❖ Because when I get claims, you just get in the middle
- ❖ Because I had a bad experience with…
- ❖ Because I get re-classed
- ❖ Because I get re-weighed

Most likely, your prospect had a bad experience with a 3PL for 1 of 2 reasons:

1) They didn't effectively engage the 3PL
2) They had a bad sales rep

If a customer uses a 3PL but engages them the same as they would an asset-based carrier, they are destined to have a bad experience. They would have been unable to realize the benefits of leveraging a 3PL and the value equation is either negative or neutral – only awaiting one thing to tip the balance to negative.

To overcome this issue, do not bad mouth the 3PL, even if they do. Bad mouthing 3PL is bad mouthing all 3PL's. Rather, explore the issue. Understand the nature of it. Get the customer to describe what they expected from their relationship, how they engaged the 3PL and what was the issue that drove them to be dissatisfied.

Whatever the outcome, don't be shy in pointing out the break point. Even if it is uncomfortable in telling the customer that they failed to utilize the 3PL and were therefore complicit in their own issues, we want to separate ourselves by pointing out what could be different. We don't need to overcome the objection for them to buy from us, only to listen. At this point our primary objective remains generating a conversation.

WE CURRENTLY WORK WITH A 3PL

- ❖ I appreciate that. What was your primary driver in selecting that 3PL? How did they deliver?
- ❖ What services are they not handling for you?
- ❖ What were the results of your last quarterly business review?
- ❖ What were the results of their last internal process review? Did you implement their strategies?

WE'RE SATISFIED WITH WHO WE'RE USING

- ❖ "Ok, no problem. Before I let you go, I'm curious to know what you would say it is that makes that relationship work so well for you?"
    - o "I'm curious to know what topics they usually cover in your quarterly business reviews?"
        - ▪ "I'm curious to know how they performed in their last pricing benchmark review?"
            - ● "Huh. Well would you at least be interested in knowing what we cover in ours?"

GENERIC OBJECTIONS

- ❖ While many of these objections may in fact be simple obstructions or knee-jerk reactions, we are now speaking with the DM and must consider every statement to be important.
- ❖ What's this regarding?
- ❖ We don't accept sales calls.
- ❖ Is this a sales call?
- ❖ Is that shipping?
- ❖ I'm too busy right now.
- ❖ We're all set.
- ❖ I'm not interested.
- ❖ We get calls from people like you every day.
- ❖ Send me your information
- ❖ Send me your rates
- ❖ No one can beat our rates
- ❖ What are your discounts/rates?
- ❖ We like to spread our business around/don't want to put all our eggs into one basket
- ❖ We email around for the best rate
- ❖ All our shipping is customer routed

"Okay, no problem. Before I let you go, I'm curious as to what I could have said that might have actually interested you."

[*Nothing, Really*]

"Ok, so really it's that you're not interested in discussing this at this time. Is that right?"

Use call backs and trigger events. An objection today may not be an objection tomorrow. The prospects circumstances may have changed, the market may have changed, your service offering might have changed. Look out for trigger events.

A Trigger Event is something new in the world that may impact their business. Use trigger events to plant seeds of why they should talk to you

"I'd like to share with you…"

UNDERSTANDING OPPORTUNITIES

This is the SELLING Phase of the Process. We are no longer prospecting. We are no longer looking to establish initial contact or check any boxes. It is now we need to investigate the company's business process, goals and challenges and assess the importance of solving them.

This is how we create new business opportunities.

Problems:

Problems are created by compensating for a lack of something. Problems boil down to a lack of knowledge, lack of time, lack of money, or lack of resources. The Benefit of any Feature is its ability to solve a problem.

Lack of knowledge

The customer doesn't know:

- ❖ Where to go to source carriers for modes outside their normal shipping
- ❖ Where to source carriers outside their geographic footprint
- ❖ How to handle lack of capacity
- ❖ How to budget truckload because of pricing volatility
- ❖ Why they incur so many damages
- ❖ What to look for when auditing invoices
- ❖ Why they get re-classed or re-weighed
- ❖ Where to go for shipping documents
- ❖ How to speed up the claim process
- ❖ How to properly insure their products
- ❖ When inbound shipments will arrive or how much they will cost
- ❖ How to budget for inbound shipping
- ❖ How much they are spending on freight by services, carrier or customer
- ❖ How to rescue a shipment in a crisis

LACK OF MONEY

The customer spends too much money:

- ❖ On people to execute the process
- ❖ For shipping modes outside their normal shipping
- ❖ Not choosing the least cost carrier
- ❖ Re-Shipping
- ❖ On damaged freight
- ❖ On Re-classes, re-weighs of LTL
- ❖ Shipping outside their geographic footprint
- ❖ Recovering dropped loads
- ❖ Overpaying invoices
- ❖ On inbound shipments
- ❖ Money over shipping budget

LACK OF TIME

Customer spends too much time:

- ❖ Sourcing shipping modes outside their normal shipping

- ❖ Shopping multiple carriers
- ❖ Fixing internal mistakes
- ❖ Inexperienced people executing shipping processes
- ❖ Looking up customer shipping information (address, product, etc.)
- ❖ Tracking individual shipments
- ❖ Sourcing carriers
- ❖ Reconciling invoices
- ❖ Billing and getting paid from customers
- ❖ Fixing accounting issues
- ❖ Researching billing disputes
- ❖ Troubleshooting and resolving issues

LACK OF RESOURCES

Customer spends too many resources:

- ❖ On people to execute the process
- ❖ On redundant tasks
- ❖ Responding to customer inquiries
- ❖ To investigate and respond to issues
- ❖ Managing multiple vendors
- ❖ Vetting carriers for safety and insurance
- ❖ Researching customer complaints
- ❖ Allocating shipping costs to the proper customer
- ❖ Holding vendors accountable for inbound shipping compliance
- ❖ Communicating shipping information between departments
- ❖ Reviewing shipping data against KPI's
- ❖ Reviewing carrier performance reporting
- ❖ Handling customer service through so many different vendors
- ❖ Managing inventory

VALUE SELLING: SITUATION

- ❖ Problems can only exist in the context of a situation
- ❖ Correlation does not necessarily mean causation

Let's examine various situations:

- ❖ Uses asset-based carriers for LTL Shipping
  - o Requires quoting multiple carriers
  - o Requires storing and accessing those quotes
  - o Requires contacting multiple carriers for multiple pickups
  - o Requires having customer shipping information available on various sources
  - o Requires tracking shipments via multiple sources
  - o Receives multiple invoices and pays multiple providers
  - o Quoting is done shipment by shipment
  - o Issues require interacting with multiple vendors
  - o Requires full time employees to manage
  - o Requires additional vendors for additional service needs
- ❖ Uses asset-based carriers for TL Shipping

- o Requires quoting multiple carriers for rates and availability
- o Requires storing and accessing those quotes
- o Requires contacting multiple carriers for pickup
- o Requires having customer shipping information available on various sources
- o Requires tracking shipments via multiple sources
- o Receives multiple invoices and pays multiple providers
- o Issues require interacting with multiple vendors
- o Requires carrier procurement, set up and compliance
- o Requires FTE(s) to manage
- o Requires additional vendors for additional services
- ❖ Uses multiple 3PL's (may include assets as well):
  - o Requires quoting multiple carriers for rates and availability:
  - o Requires storing and accessing those quotes
  - o Requires contacting multiple carriers for pickup
  - o Requires having customer shipping information available on various sources
  - o Requires tracking shipments via multiple sources
  - o Receives multiple invoices and pays multiple providers
  - o Issues require interacting with multiple vendors
  - o Requires carrier procurement, set up and compliance
  - o Requires FTE(s) to manage
  - o Requires additional vendors for additional services
  - o Requires redundancy in all processes despite using 3PL's
- ❖ Uses a 3PL – but performs processes manually:
  - o Requires manually quoting for rates and availability
  - o Requires storing and accessing those quotes
  - o Requires manually scheduling pickups
  - o Requires having customer shipping information available on various sources
  - o Requires manually tracking shipments
  - o Manually receives and reconciles freight invoices
  - o Doesn't have visibility over carrier issues
  - o Requires FTE(s) to manage
  - o Requires redundancy in all processes despite using 3PL's
- ❖ Uses a 3PL effectively:
  - o Quoting is automated
  - o Data storage is automated
  - o Shipment execution is automated
  - o Customer shipping, product and tracking information is available
  - o Can receive one invoice, if preferred
  - o Pays one vendor
  - o Has one contact for issue resolution
  - o Carrier procurement, set up and compliance is managed by the 3PL
  - o Requires less FTE's to manage the process
  - o Provides a source for alternative shipping needs
  - o Provides visibility, scalability and control

First, identify which scenario best describes your prospect's situation. Then probe to identify which "situational statements" are true. This will provide you with the context to probe for common customer problems.

The Selling Phase

A New Opportunity is when a Decision Maker engages with you in the sales process. An Opportunity can only occur with the person who has Final Decision-Making authority. The Decision Maker is engaged in the sales process when:

- ❖ They agree to a call to discuss business
- ❖ They provide a financial opportunity relevant to account size
- ❖ They agree to a next action

Engage in conversation with the Decision Maker to:

- ❖ Determine current situation
- ❖ Identify business and shipping problems
- ❖ Link to business implications
- ❖ Earn agreement

Before you begin, especially when dealing with a DM or Influencer other than the business owner:

- ❖ Do your homework
- ❖ Determine your call objectives
- ❖ Confirm their authority to buy
- ❖ Establish rapport

Homework

- ❖ Review company website
- ❖ Research the company
- ❖ Research the industry
- ❖ Research the decision maker

Review company website:

- ❖ Look for key words
- ❖ Organizational Structure
- ❖ Leadership & employees
- ❖ History
- ❖ Testimonials, Blogs, White Papers
- ❖ Links to other companies
- ❖ Culture
- ❖ Links to Social Media
- ❖ Sponsorships and charities

Research the company:

- ❖ Google them!
- ❖ Look for 3rd party articles about the company
- ❖ Research their products
    - o What does it do?
    - o How is it made
    - o Who uses it and why?
    - o Who else makes this product?

- o Look for 3rd party articles about the product
- ❖ Who are their top competitors?
  - o Research top competitors
- ❖ Who are their top customers?
  - o Research top customers

Research the industry:

- ❖ History
- ❖ Challenges
- ❖ Regulations
- ❖ Changes
- ❖ Forecasts

Research the decision maker:
- ❖ Google
- ❖ LinkedIn
- ❖ Twitter
- ❖ Facebook
- ❖ Blogs/White papers
- ❖ College
- ❖ Degree(S)
- ❖ Companies worked for
- ❖ Positions held
- ❖ Interests
- ❖ History

Call Objectives:

- ❖ Get to the next step!
  - o Thorough understanding of their current situation
  - o Discuss explicit needs & identify problems
  - o Link problems to business implications
  - o Earn agreement on potential solutions
  - o Secure data
  - o Secure account application
  - o Determine their problem is one we can solve
  - o Understanding of their buying process
  - o Gain a next action

Confirm Buying Authority:

FINANCIAL CAPABILITY: Because the prospect is already using like services, we can largely assume that they will not need to commit additional funds or resources to use your service instead. However, it still requires investigation.

AUTHORITY: There's nothing worse than spinning your wheels to find out that the Influencer who claimed authority must seek permission from an unknown executive who blindly rejects your proposal before having an opportunity to sell.

"If I were to present you with something that made financial sense, are you in a position to commit your business to me?"

"Is there anyone else who should be joining us today?"

"If I were to present something to you that makes sense, what would you imagine the process would be from there?

Establish Rapport

Active Listening:

- ❖ Plan to listen
- ❖ Watch your talking
- ❖ Clarify and paraphrase, "Just so I understand… is that correct?"
- ❖ Explore different areas and in different ways
- ❖ Seek to understand. Be a student, not a teacher
- ❖ Ask to follow up questions, make connections and inferences
- ❖ Concentrate!
- ❖ Nothing you say will ever be as impactful as how you listen

Establish Trust:

- ❖ Look for win/win scenarios
- ❖ Never compromise integrity (short term compromises do not make for long term customers)
- ❖ Make your motives transparent. Be direct!
- ❖ Do what you say you're going to do when you say you're going to do it
- ❖ Substantiate your claims (numbers, testimonials or previous results)

Engaging the Sales process:

- ❖ To create opportunities, find & address their problems and then establish urgency

The Opportunity Stage is about building on the emotional impact of rational problems.

The greatest determining factor in any sale is WIIFM (*WHAT'S IN IT FOR ME???*)

- ➢ Rational impact of problems = ROI

- ➢ Emotional impact: Desire for success, financial freedom, peer recognition, pride, happiness, stress reduction

Setting the agenda:

- ❖ Thank them for the call
- ❖ Ask if there's anyone else who should be there
  - o "Here's what I would like to accomplish today:
- ❖ Confirm qualifying information
- ❖ Recap previous discussion / ask if anything has changed
- ❖ Outline specific topic(s) of discussions, your objectives and next steps
- ❖ Set a time frame
- ❖ Ask for agreement

❖ Ask if there's anything additional they would like to cover
❖ GO!

SETTING NEXT STEPS

What's the objective of this step?

➢ To get to the next step!

➢ **Set date and time with a decision maker with an agreed upon objective**

➢ Next steps are trial closes. If you are not awarded a next step there is probably a reason why. Better to address it now rather than go through the motions of a sale you may never win.

Ask the question you don't want the answer to:

❖ "I think this call went well. Do you agree?"
❖ "Here's why I think this went well. I think I see a possible match between what we do and what you're trying to accomplish. Do you agree?"
❖ "I'd like to call you Wednesday @ 2pm to show you an outline of how we might work to solve this issue together. Does that make sense to you?"
❖ "Based on our discussion, I'm fairly confidence we can help. What I think would give you the best idea is if we set up another call, how's Wednesday @ 2pm?"
❖ When you need to involve someone else:
❖ "This may be an area where I am no longer an expert. I'd like to set up a call and introduce me _____ _____ to you(r) _____ to explore this in more detail. How's Wednesday @ 2pm"

Investigating Needs

❖ Employ active listening, if pursuing a line of questioning look for:
❖ Ask to clarify:
❖ It's often our job to make our prospects uncomfortable
❖ We can't turn everything into a sale. We must find what's important to the prospect.

Understand at a high level what is most important to their business with these following impactful questions:

➢ What drives or inhibits growth?

➢ What drives or inhibits costs?

➢ What drives or inhibits customer satisfaction?

➢ How you measure or monitor growth?

➢ How do you measure or monitor costs?

➢ How do you measure or monitor cash flow?

➢ How do you measure or monitor customer satisfaction?

➢ What internal challenges do you face?

Effective questions are the bridge between "Hello" & "Let's go."

Use the "PAUSE" liberally.

- ❖ Why Pause?
    - o Pausing helps you to collect your thoughts
    - o Pausing helps you to seem unscripted
    - o Pausing allows your prospect to interject important comments
    - o Pausing allows you to take your prospects temperature
    - o Pausing allows you to take better notes
    - o Pausing is a critical component to Active Listening

The 30 Second Commercial

"Before we begin, let me give you a snapshot of who we are…"

Until this point, we have offered very little about Beemac Logistics other than our elevator pitch. We are nowhere near ready to offer solutions or pitch our services, but before we take a deep dive into their business needs, let's take a moment to let them know a little more about:
- ❖ Who we are?
- ❖ What we do
- ❖ What problems we solve
- ❖ What people need us
- ❖ What makes us different than the competition
- ❖ Open-ended question (the *hook*)

"Why don't you start by telling me a little more about your company?"

Now that you've opened the call:
- ❖ Get down to business quickly
- ❖ Concentrate on questions
- ❖ Don't talk about solutions

At the end of each call exists three possible outcomes:
- ❖ Move UP – successful call resulting in a sales or next step
- ❖ Move OUT – Refused service or next step and no needs found
- ❖ Continuation – unsuccessful; the discussion is open ended with no next step or agreement to buy

Multiple research studies have shown that more questions are asked in successful negotiations than unsuccessful ones (*SPIN Selling*). There are four types of questions to ask:
1) Situation
2) Problem
3) Impact
4) Benefit

Situation:
- ❖ Gain a thorough understanding of the customers current situation

Problem:
- ❖ Probe for an identify problems, challenges or dissatisfactions the customer has with their current provider or situation

Impact:
- ❖ Probe for an identify the business impacts of those problems

Benefit:

❖ Probe to determine how impactful solving the problem will be and gauge the customers eagerness to do so

Situation Questions

Situation Questions are used to establish a foundation of understanding:
❖ What do they do?
❖ How are they doing it?
❖ Why are they doing it that way?
Review the "Situation-Scenarios"
❖ Ask questions to determine the specifics of theirs
❖ Establish a context for uncovering buyer problems
❖ Get familiar with similar situations, but ASK, don't assume!

Situation Questions:

<u>Begin with Executive/Administrative</u>

Start at the 50,000-foot level to understand company initiatives and direction:
❖ What's going on with your company lately?
❖ What type of growth is your company experiencing?
❖ What are your goals & challenges for the year?
❖ What are the next big projects you're trying to tackle?
❖ Could you tell me a little more about your executive team?

Then step down to 40,000 feet and find out how the company operates:
❖ What is information you'd like to have visibility on but don't?
❖ How do the different departments share information?
❖ Who are your top competitors?
❖ How do you separate yourself from your competition?
❖ Why do customers choose you?
❖ What does your customer expect from you?
❖ Could you tell me a little more about how your product works?

<u>Move into Finance:</u>

❖ How do you currently measure your freight budget vs. actual?
❖ What are the greatest factors for missing budget?
❖ How much visibility do you have into this?
❖ Other than labor and raw materials, is there a greater expense than your freight?
❖ How much is a customer worth to you?

<u>Move into Sales, Marketing & Customer Service:</u>

❖ How do customers do business with you (repeat, one time, etc.)?
❖ How do you market your product?
❖ What sort of challenges do your customers face?
❖ Tell me a little about your sales process?
❖ How are customer orders placed and processed?
❖ Tell me about your customer service department?

- ❖ What type of visibility do they have over the order process?
- ❖ Shipping process?
- ❖ What issues or complaints do they typically field the most?
- ❖ Are there ever issues they need to escalate?

Now let's touch on Technology:

- ❖ What does your technology department look like?
- ❖ What systems does your company use the most?
- ❖ How do they support other departments?
- ❖ What kind of technology support do you have for your supply chain?
- ❖ Tell me about your order management system?
- ❖ What systems or technology could make your life easier?

Now pivot to Operations at 30,000 feet and work down to shipping:

- ❖ Walk me through your Operations?
- ❖ Are there any process redundancies you're aware of?
- ❖ How many people work in the warehouse?
- ❖ What's are the typical factors in choosing your vendors?
- ❖ Where do you source your raw materials?
- ❖ How much inventory do you carry?
- ❖ How is your product manufactured?
- ❖ How is it packaged and stored?
- ❖ Do you stock raw materials or do your special order for each product?

Now pivot to Operations at 20,000 feet and work down to shipping:

- ❖ How do you anticipate running into any backordered inventory?
- ❖ What is your manufacturing lead time?
- ❖ Inventory turn cycle.
- ❖ What is the lead time between order placement, production and delivery?
- ❖ What's your process for maintenance, repair and operations?
- ❖ What's your process for identifying and resolving defective products?

Now pivot to Shipping directly:

- ❖ What are your current supply chain initiatives?
- ❖ How often are you involved in shipping?
- ❖ How do you measure carrier performance?
- ❖ What do your customers expect from your shipping process?
- ❖ How many people do you have involved in shipping?
- ❖ Do you ever have projects that require meeting installation teams?
- ❖ What isn't your current process giving you that you need?
- ❖ Do you find your process to be automated or more manual and 'paper'?
- ❖ Can you think of a competitor or other business that has it the way you'd like it?
- ❖ What visibility do you currently have over your transportation process?
- ❖ Who's responsible for making sure what was quoted is what gets billed?
- ❖ Who performs freight bill pay and audit?
- ❖ Who does your claims management?
- ❖ What is your strategy for mitigating GRI and TL volatility?

✦   What's the process or criteria for how a shipment is to be routed?
✦   Is there any process that's automated or ties into your other systems?

INVESTIGATING NEEDS

Problem questions are questions about problems or dissatisfactions about an existing situation. People only buy if they recognize they have needs. Needs almost always start with a problem or dissatisfaction. Problem questions are how you get from "hello" to "what, wait a minute?" Continue revealing and clarifying until <u>you and the buyer share a thorough understanding of the problem.</u>

Implicit vs. Explicit needs:

There are two types of needs, Implicit and Explicit. Explicit needs are easy to identify. They are direct statements about needs, wants or desires. "I need this" or "I want that." Implicit needs are a little tougher to discern. Implicit needs are statements about dissatisfactions, problems, lack of something that *Imply* they need or want a solution to the problem.

"I'm tired" is a complaint indicating I did not sleep enough last night. It implies that I may want coffee, but I also may want a nap. I may not even like coffee. So, while the need is implied, it is not confirmed.

"I want coffee" is an explicit need where my wants are clear. While coffee may be a temporary solution to my problem of being tired, it doesn't mean that is why I want coffee. I may just enjoy having coffee. Our role here is to understand the difference, uncover implied needs and attempt to develop them into explicit needs.

Developing explicit needs is what ultimately moves a customer to make a change.

Implied Needs - Statements by the customer of problems, difficulties, and dissatisfactions
✦   It takes too long to get quotes
✦   My customers complain about transit times
✦   I use a National Carrier for even my short haul lanes
✦   It takes A/P hours to reconcile invoices
✦   I don't know what's in transit to me
✦   I'm tired!

Explicit Needs - Specific customer statements of wants or desires
✦   We need a TMS
✦   We need faster transit times
✦   We need more carrier selection
✦   We need consolidated invoicing
✦   We need an inbound shipment report
✦   I need coffee!

Explicit needs are required for a prospect to decide to buy or make a change. Implied needs are the building blocks for developing those needs. Effective problem questions:
➤   Reveal the buyers implied needs
➤   Clarify the buyer's difficulties or dissatisfactions
➤   Gain *shared* understanding of the buyer's problems

Your objective is to identify 3-5 key problems (Refer to Sales Approach) with business implications that we could potentially solve:

- ➢ Probe to identify challenges in the various areas of their situation
- ➢ Ask questions to connect their shipping problems to business problems
- ➢ Focus on the problems to which we offer solutions

Conclude your situation questions and review your notes. Check your hot box for potential rabbit holes.

- • Link your questions to buyer statements
- • Link your questions to personal observations
- • Link your questions to 3rd party situations
- • "Earlier, you told me that…"

Problem Questions:

- ➢ What keeps you up at night?
- ➢ If you could wave a wand and tackle any problem what would it be?
- ➢ What don't you know yet that you'll need to find out?
- ➢ What is information you'd like to have visibility on but don't?

- ➢ How is that process working out for you?
- ➢ Where are you dissatisfied with performance?
- ➢ What events cause disruption to your product line or inventory?
- ➢ What happens if you can't meet customer demands?
- ➢ What happens if your schedule is compromised?

- ➢ Who is the first one in your organization to hear about a customer problem?
- ➢ How do you hear about these problems?
- ➢ Who within your company handles customer concerns?

- ➢ What challenges are you faced with in meeting your customer expectations?
- ➢ What are your largest challenges in satisfying your customers?
- ➢ Who is affected when you don't satisfy a customer?

- ➢ What % of your freight spend is due to fines from vendors for missed appointment times, etc.?
- ➢ Who is responsible for handling and monitoring claims?
- ➢ What impact do charge backs have in your industry?
- ➢ Who in your company is affected by those charge backs?
- ➢ What challenges do you find by having multiple carriers?
- ➢ Are there any other areas that you have multiple vendors for one business need?

- ➢ What else could that employee be doing?
- ➢ What does that take away from?
- ➢ How much (time, money, resource) does that take?
- ➢ How does that affect…?
- ➢ How often does that happen…?
- ➢ Does that ever lead to…?
- ➢ Who must deal with…?
- ➢ How long does it take to resolve…?
- ➢ What happens when…?
- ➢ What does that result in…?

Impact Questions ask about the consequences or effect of the customer problem on their business. Here you build on the impact of the customer problem, so it becomes large enough to justify action. Impact questions are a powerful, needs development tool in that they expand the buyer's perceived value. They can be effective in any sized sale but are most effective in Large client and with Multiple Daily shippers.

Impact Questions is where you go from "Hello" to "Oh, Oh"

Situation:
- Current shipping processes are all manual
- #1 goal is to reduce turnover

Problems
- Manual processes are overloading the system
- Company is rushing to complete orders, sending our incorrect product figures
- Rush orders are leading to problems in scheduling installations

Impacts
- Losing customers
- Decreased sales
- Frustrated salespeople are leaving

BENEFIT QUESTIONS

Use benefit questions to determine the impact of your solution to the company and to assess how much of an impact your solution will make. Many 'fence sitters' are due to overzealous salespeople seizing the moment and moving right into their presentation without fully getting the customer to buy in.

Benefit Questions are:

- Intended to turn Implied Needs into Explicit needs
- About the value, importance or usefulness of a solution to a buyer problem
- Focus on the benefit of a solution (not the pain of the problem)
- Ensures you and the DM are aligned
- Gets the buyer to tell you about potential benefits
- Primes the buyer to demonstrate your solutions
- Increases acceptability of your solution
- Reduces objections
- They are trial closes

Benefit Questions are how you finally arrive at "Let's Go"

Benefit Questions can often be a simple "If/then" question. If/then: "If I could solve your problem, would you want me to?"
- Why is that important to you?
- Could you tell me more about your need for…?
- Do you want this to save costs or better serve your customers?
- How much savings would that mean?
- What other tasks would this enable you to complete that you can't now?
- How important is it to double your response time?
- Would it be useful to…?
- If you could increase turnover around, what would that mean for your sales?
- If I could show you a way to do that…. Would you take advantage of it?
- Could this also allow you to…?

Another powerful way to use benefit questions is to get the customer to tell you the benefits of your solutions. "Is there any other way that X could help you with Y?"

PRESENTING SOLUTIONS

It's time to craft and present your solutions.

"FAB" is a sales term used to describe:
- ❖ Features and Benefits
- ❖ Features, Advantages & Benefits
- ❖ Features, Applications & Benefits

Different sales methodologies refer to it as something different. We are going to employ the logic of all three. We covered **Features and Benefits** earlier.

Features, Advantages, Benefits
- ❖ Features describe what it is
- ❖ Advantages highlight how it is used
- ❖ Benefits

Features, Applications, Benefits
- ❖ Features describe what it is
- ❖ Applications describe how it works
- ❖ Benefits describe how it will address a concern and benefit the customer

Recap your conversation:
- ➢ Highlight the specific problem areas discussed
- ➢ Restate the implications of those problems
- ➢ Ask for agreement

Refer to your hot box!
- ➢ "Earlier we discussed how you were having trouble with…"
- ➢ "You also mentioned some frustrations regarding…"
- ➢ "We also uncovered that…"

Be sure to ask for agreement.

Then, restate the implications of those problems.
- ❖ So, we determined that… costs….
- ❖ We found that… impacts…
- ❖ I understand that… slows down…

Ask for agreement
- ❖ If I could solve that problem, would that be something you'd want to take advantage of…?

Transition to offering your solutions.

Bad news vs. good news

"Well, Ms. Customer, we've done a pretty deep dive of your business and unfortunately we uncovered some areas of improvement. The good news is I have some suggestions for you to make those improvements…"

1) Restate the specific problem and its business implications
2) Describe the feature
3) Demonstrate or detail how it works
4) Show them how it will benefit them by solving their problem
5) Close for agreement

Restate:
➢ Ok, so we discussed how the Warehouse Manager spends too much time performing manual tasks such as calling TL providers for quotes. This distracts from his core responsibility of managing inventory, causing you to run out of inventory, delaying shipments and failing to satisfy customer expectations

Describe the feature:
➢ My solution for you is to access our Carrier Procurement Team.

Demonstrate or detail how it works:
➢ How this works is the Warehouse Manager will simply send the order to us. Our staff of nearly 100 freight brokers will engage their carrier portfolio of over 15,000 trucking companies and provide you the best options for reliability, transit time and of course cost. Our team vets every carrier for their safety rating and insurance coverage

Show them how it will benefit them by solving their problem:
➢ The benefit to you is that the warehouse manager can again focus on his core responsibilities, therefore keeping up on inventory and ultimately increasing customer satisfaction.

Close for agreement:
➢ Can you see how this will be an improvement upon the current process?

Handling Feature & Closing Objections

Handling objections at this stage is different than all others because they are objecting directly to your solution. There are 2 main reasons for this. They either don't care about what you're offering or don't understand what you're offering. When you ask if they can see an improvement or if they would be likely to implement your solution and they say no, DO NOT PASS GO. You need to stop where you are and address this issue. It can no longer wait until later.

- ➢ Listen
- ➢ Assess
- ➢ Isolate
- ➢ Reframe
- ➢ Overcome

Go back through your notes. Recap your conversation – again. Ask for agreement of understanding their situation. Review the problems and ask that you properly understood them. Review the impacts of those problems and confirm the customer agrees with your assessment.

Ask clarifying questions. Once again be a student, not a teacher, and be sure you understand what the customer has been saying. Once you confirm that:
  a) The customer doesn't find value in solution, you just misheard or misunderstood, drop it from your presentation and move on.
  b) The customer now understands and agrees there is value, continue in your presentation

The act of "Closing" is simply asking for a yes. It is just the natural outgrowth of a sales conversation. Closing secures a commitment to move the ball forward with a specific course of action. There's nothing "salesy" or adversarial, you are helping customers decide to buy or implement your solution.

<u>Set the table:</u>

Recap: Repeat the highlights of your solution to the customer, briefly reminding them of the shared agreements. This will be more like a summary as opposed to trying to earn mini agreements this time. Ask to ensure there is nothing you left out.

<u>Check yourself:</u>

- ✔ You're at the right level & understand the buyer's criteria
- ✔ You've identified pain points, dissatisfactions & goals
- ✔ You demonstrated solutions & clearly explained the benefits
- ✔ You've differentiated yourself Close with the right actions
- ✔ Make actionable recommendations, don't be an infomercial
- ✔ Close with a live voice
- ✔ Make it personal

Just one more question to ask…

Ask the question:
- ➢ "It makes sense to me. Does it make sense to you?"
- ➢ "My suggestion would be for us to move forward, what do you think?"
- ➢ "I'd like you to give me a shot. What do you say?"
- ➢ "Will you be my customer?"

- ➢ "Do you agree this will be an improvement on your current situation?"
- ➢ "I'd like to work with you…"
- ➢ "I think we can improve upon this together; do you agree?"
- ➢ "All I need from you to get going is your first shipment…"

Overcoming Closing Objections

Be willing to challenge the customer but be as willing to walk away. A NO doesn't mean NO always.

To overcome closing objections:
- ➢ Identify the root of their concern
- ➢ Clarify their concern
- ➢ Isolate their concern
- ➢ Address their concern

Push back against put-offs:
- ➢ "We need to think about it…"
- ➢ "I'll need to review this with…"
- ➢ "I'll bring this up at my next meeting…"

Welcome it:
- ➢ "Ok, you want to make sure you're making a good business decision, that makes sense…
Clarify it:
- ➢ "So, you're saying you want the input from other team members, is that right?"
- ➢ "I understand it's a lot to digest. So, you want to make sure you've got a handle on all of it, is that right?"
Isolate it:
- ➢ "Other than making sure you've given this a thorough review, is there anything else holding you back from giving me the green light today?"
- ➢ "Other than getting feedback from your team, is there anything else preventing us from moving forward today?"
Address it:
- ➢ "That makes sense but let me ask you. When we began, you agreed that if I offered you something that made sense, you'd be able to take advantage of it. Could you help me to understand where I came up short?"
- ➢ "You want to make sure you're making a good business decision, that makes sense. I'd hate to leave here thinking I left something in complete, could you tell me which parts you need to think more on?"

The price objection:
- ➢ "Can't it be less?"
- ➢ "It's too much money."
- ➢ "Your bid isn't as competitive as the other guys. What can you do for me?"

When presented with the Price objection do not instantly cave. Be prepared to be the tough negotiator your resume says you are but choose your words carefully. Don't say "You get what you pay for." Rather, focus on monetizing the value of your solution.

How much time are you freeing up the warehouse manager?
What is his hourly rate?

How much time are you freeing up the procurement manager?
What is her hourly rate?
What else is she to focus on and what does that yield?
How many customers did the customer agree they may retain?
How much are those customers worth?

Be sure to hear the customers objection. Listen and try to understand the true nature of the Price objection.

Assess

"I do see rates all over the map these days. I'm curious, what are you still looking to achieve that you haven't awarded them (competitive bid) the business already?"

"Ok so you agree my services will improve your business, but feel the rates aren't as competitive as you'd like, is that right?"

Isolate

"Other than the rates not being where you'd like them to be, is there anything else that's preventing you from moving forward with me today? Can you tell me where I need to be to make a difference?"

Reframe

"Ok, so what you're saying is that you like what you're seeing, but aren't sure there's enough financial upside to justify making a move, is that right?"

Overcome

Go through the Value Adds and confirm financial impact (Benefit Questions)
Where else can we add value?
What else we can negotiate?
Payment terms?
Lower rates for commitment for more volume?

Increase perceived value:

Can you see the financial impact you'll be making now?
You can see that we'll be improving your bottom line and still reducing your freight costs
So, will you give me a shot?

What happens when you can't overcome the objection - Today?

➢ Move the ball forward:
    o Ask for commitments
    o To set up a call for a decision
    o Get documents, signatures, information
    o Dates and times
    o Shipping hours
    o Customer dock hours
    o Emails for A/R
    o SOMETHING!

Menu Workbook Exercise

Objective: This exercise is meant to help you learn and understand the difference between Beemac's Main, Secondary, additional and value-added services.

Instructions: Next to each of the following Services or Value-Adds, write the letter of the category to which it best fits

Services:

1) Full Truckload _____
2) Intra-Canada _____
3) Air Freight_____
4) Bundled Transportation Services _____
5) Comprehensive Invoicing _____
6) Military Access _____
7) Less-Than-Truckload _____
8) 24:7 Live Dispatch _____
9) Hazmat Shipping _____
10) International Shipping _____
11) Liftgate at delivery _____
12) Reefer _____
13) Trade Show Delivery _____
14) Cargo Insurance _____
15) Expedited Shipping _____
16) White Glove _____
17) Flatbed _____
18) Carrier Procurement/Capacity _____
19) Cross border Mexico _____
20) Cross border Canada_____

A) Primary Services

B) Secondary Services

C) Additional Services/Accessorials

D) Value Adds

Commodity Research Assignment 1.1

Team Name: _____

Team Members: _____

_____

Assignment: Research the commodity below and answer all related questions.

Commodity: **Steel Coil**

What are Steel Coils used for?

_____

_____

Who are the end users of Steel Coils?

_____

_____

How are Steel Coils manufactured?

_____

_____

What are threats to the Steel Coil manufacturing industry?

_____

_____

Is there a region within the U.S. Steel Coils is predominantly manufactured? If so, why?

_____

_____

What is the average lifespan of Steel Coils (how long does it usually last before it needs to be replaced?

_____

_____

What are 3 interesting things you learned (other than any information listed above) while researching Steel Coils?

_____

_____

Commodity Research Assignment 1.1

Team Name: _____

Team Members: _____

_____

Assignment: Research the commodity below and answer all related questions.

Commodity: **Sugar Substitutes**

What are Sugar Substitutes used for doing?

_____

_____

Who are the end users of Sugar Substitutes?

_____

_____

How are Sugar Substitutes manufactured?

_____

_____

What are threats to the Sugar Substitutes manufacturing industry?

_____

_____

Is there a region within the U.S. Sugar Substitutes are predominantly manufactured? If so, why?

_____

_____

What is the average lifespan of Sugar Substitutes (how long does it usually last before it needs to be replaced?

_____

_____

What are 3 interesting things you learned (other than any information listed above) while researching Sugar Substitutes?

_____

_____

Commodity Research Assignment 1.1

Team Name: _____

Team Members: _____

_____

Assignment: Research the commodity below and answer all related questions.

Commodity: **polyvinyl chloride**

What is polyvinyl chloride used for?

_____

_____

Who are the end users of polyvinyl chloride?

_____

_____

How is polyvinyl chloride manufactured?

_____

_____

What are threats to the polyvinyl chloride manufacturing industry?

_____

_____

Is there a region within the U.S. polyvinyl chloride is predominantly manufactured? If so, why?

_____

_____

What is the average lifespan of polyvinyl chloride (how long does it usually last before it needs to be replaced?

_____

_____

What are 3 interesting things you learned (other than any information listed above) while researching polyvinyl chloride?

_____

_____

SCRIPTS

Cold Call: **Connected to a Name**

Greeting:	Good morning!
Name:	My name is [*first name*]
ID:	with Beemac Logistics.
Purpose:	I'm calling to learn about your company's shipping process.
Call to Action:	Who could you direct me to?
	That would be [name]…

[CONNECTING]

Greeting:	Good morning [*name*],
Name:	This is [*first name*]
ID:	with Beemac Logistics, thanks for taking the call.
Re-Qualify:	I'm calling to learn more about your shipping process and was told you'd be the person to speak with. Is that correct?

[YES]

Purpose:	Excellent!

Prospecting Questions:

- ❖ Do you ship or receive Full Truckload Shipments?
- ❖ Do you receive Expedited Shipments?
- ❖ What is your average volume per week?
- ❖ And you're responsible for paying for the shipping?

Cold Call: **Connected to Business Owner**

Greeting: Good morning!

Name: My name is [*first name*]

ID: with Beemac Logistics.

Purpose: I'm calling to learn about your company's shipping process.

Call to Action: Who could you direct me to?

                    That would be [name/Owner] …

[CONNECTING]

Greeting: Good morning [*name*],

Name: This is [*first name*]

ID: with Beemac Logistics, thanks for taking the call.

Re-Qualify: I'm calling to learn more about your shipping process and was told you'd be the person to speak with. Is that correct?

[YES, I'm the Owner]

Purpose/IBS: Excellent! We help businesses deliver expectations by providing personal, concierge level service our customers rely on.

Prospecting Questions:

❖ Do you ship or receive Full Truckload Shipments?
❖ Do you receive Expedited Shipments?
❖ What is your average volume per week?
❖ And you're responsible for paying for the shipping?

Initiating Contact with PSC:

Greeting: Good morning!

Name: This is [*first name*]

ID: with Beemac Logistics

Requalify: Earlier I spoke with [*initial contact first name*] who told me you were the person who oversees your company's shipping processes, is that right?

[YES]

Recap: Excellent! [*initial first contact first* name] also told me that you are currently shipping [#] [mode] per [day/week], is that correct?

[YES]

Purpose/IBS: Excellent! The reason for my call is to introduce myself. We help businesses deliver expectations by providing personal, concierge level service our customers rely on and I wanted to learn a little more about you.

OEQ: Would you walk me through your current shipping process?

Warm Call to PSC:

Greeting: Good morning!

Name: This is [*first name*]

ID: with Beemac Logistics

Requalify: Last time we spoke, you told me you oversaw your company's shipping processes, is that right?

[YES]

Recap: Excellent! You also told me that you are currently shipping [#] [mode] per [day/week], is that correct?

[YES]

Purpose/IBS: Excellent! We help businesses deliver expectations by providing personal, concierge level service our customers rely on. The reason I'm calling today is to get a better understanding of your shipping process.

OEQ: Would you walk me through it?

Continuation with PSC:

Purpose/IBS: Excellent! Well, [*Primary shipping contact first* name], We help businesses deliver expectations by providing personal, concierge level service our customers rely on.

Recap/OEQ: So, you're currently shipping [#] [mode] per [day/week], would you walk me through your

shipping process?

QUALIFYING POINTS:

- ➢ **Re-Qualified Decision Maker(s) and Influencer(s)**
    - o   Who would be responsible for making changes to your company's shipping processes?
    - o   Other than yourself, who is involved in decision making?
    - o   Who would be responsible for making the company's financial decisions?
- ➢ **Re-Qualified weekly shipping volume by mode**
    - o   Ok, just to confirm that was [#] [mode] per [day/week/month], is that right?
- ➢ **Re-Qualified prospect pays for the shipping**
    - o   And those are the shipments you receive invoices for?
- ➢ **Re-Qualified primary mode is TL or Expedite**
    - o   And that was [mode], correct?
- ➢ **Identified shipping lanes, regions, locations**
    - o   Where are you shipping to/from?
    - o   What are your most common lanes?
    - o   Do you operate in specific regions of the country?
- ➢ **Identified incumbent providers, brokers, etc.**
    - o   What brokers or 3PL's are you currently using?
    - o   What's the name of the LTL carriers you use?
- ➢ **Identified mode(s) and equipment used**
    - o   What type of trucks do you typically ship on?
    - o   Now is that dry van? Is that standard flatbeds?
    - o   Do you require any special equipment?
- ➢ **Identified commodity and value***
    - o   What are the commodities you are shipping?
    - o   What is the typical value of these products?
    - o   Do you sell your product by unit value or price per pound?
- ➢ **Identified special requirements, equipment or services**
    - o   Do you have any special requirements such as equipment, services, delivery requirements?
- ➢ **Identified quoting, booking and selection process**
    - o   Would you walk me through your process of getting quotes, choosing and booking your carriers?

ALTERNATE QUESTIONS:

Requalified Decision Maker(s) & Influencer(s)

- Who is the person responsible for transportation decisions?
- What's the name of the person who selects the carrier to be used?
- What's the name of the person who negotiates your freight contracts?
- What's the name of the person who approves quotes?
- What's the name of the person who approves carriers?
- What's the name of the person who chose your current carriers?
- Who makes financial decisions for the company?
- Who makes business decisions for the company?
- Who makes purchasing decisions for the company?
- Who makes technology decisions for the company?
- Who makes operational decisions for the company?
- Who else is involved in the decision-making process?
- Are decisions for additional locations made locally, or are they centralized?
- What is your role here?
- Who is the person with final authority over the transportation budget?
- How did you arrive at the decision to use your current providers?

Requalified weekly shipping volume by mode

- What is your volume per week?
- How many shipments did you ship, receive or pay for last week? The week before that? Three weeks ago?
- Would it be fair to say that's an average?
- What is the most amount of shipments in each week?
- What is the least amount of shipments in each week?
- What is your average volume in season?
- When does your season begin and end?
- What is your monthly spend on TL?
- What is your monthly spend on Expedite?
- What is your monthly spend on LTL?

Requalified prospect pays for shipping?

- Do you receive invoice from the carrier?
- Who receives the invoice from the carrier?

Requalified primary mode is TL or Expedite

- Do you ship TL or Expedite shipments?
- Do you receive TL or Expedite shipments?

Identified Shipping lanes, regions, locations

- Where do you typically ship to & from?
- Lanes, regions, locations & location type
- Businesses, residences, warehouses, DC's, farms, strip malls, etc.
- Where do you ship to?

➢ How many locations do you have?
➢ Where are your vendors located?

Identified incumbent providers/brokers

➢ Who are you currently using?
➢ Carriers, brokers, 3PL's – confirm if any 'carrier' is accessed directly or via 3PL
➢ What 3PL are you currently using?
➢ What brokers do you currently work with?

Identified mode(s) and equipment used

➢ Do you typically ship via dry van, flat bed, reefer, LTL, partial or utilize any special equipment?
➢ Do you require guaranteed services?
➢ Do you require expedited options?
➢ Do you ship domestic airfreight?
➢ Do you ship or receive international shipments?
➢ Do you ever ship over dimension?

Identified commodity and value

➢ What are you shipping?
➢ Do you sell your product by unit value or price per pound?
➢ What is the typical load value?
➢ What products or commodities do you ship?
➢ What is the class?
➢ What is the NMFC?

Identified special requirements, equipment or services

➢ Do you have any special requirements such as equipment, services, delivery requirements?
➢ What special services do you currently use?
➢ Do you ship Hazmat?
➢ What accessorial services do you use?
➢ Do you ship to tradeshows?
➢ Do you ship to residences?

Identified quoting, selection & booking process

➢ How do you get your quotes?
➢ How much lead time do you typically have and provide?
➢ Which do you value more when choosing your provider: price, transit time or reliability?
➢ Do you have any FAK's?
➢ Do you have pallet rates?
➢ Do you have minimums?
➢ How do you complete your BOL's?
➢ How do you schedule pick-ups?
➢ Who is responsible for preparing shipments?
➢ Who is responsible for auditing and paying invoices?
➢ What time are your pick-ups made?
➢ Besides price, what are the determining factors in choosing your carrier?

➢ If two carriers were similar in price and transit time, what other facts might you consider?
➢ How do you schedule pick-ups?

WHY

(What, How, Why?)

In this exercise, the statements in **BOLD** lettering are statements made by a real customer on an actual sales call. Your job (the salesperson) is to dig deeper. Investigate needs using the formula of what, how, why.

Question 1 should be a WHAT question aimed at understanding the situation

Question 2 should be a HOW question aimed at understanding their process

Question 3 should be a WHY question aimed at uncovering the motives behind what they are doing and ultimately setting up

Situation: The CEO

3 different brokers: Freightquote, TQL and Unishippers

Book "online"

5-10 LTL shipments outbound per week

Shipping to retailers

Eco-friendly products for household, pets and baby/kids.

EXAMPLE: We work with 3 different brokers. I review them each year.

1. What brokers are you currently working with?

2. How do you go about reviewing your brokers each year?

3. Why do you do it that way?

We do everything automatically. We like to set up the address books and all the products ahead of time so it's easy to tender a shipment.

1.

2.

3.

All our brokers must tell us which carriers they're offering in the quotes because we have preferred carriers for each of our customers.

1.

2.

3.

Yes, and we also care about the quality of the broker in terms of getting us the paperwork.

1.

2.

3.

A lot of our customers have penalty fees if the carrier is late for an appointment, if the carrier does a sort & seg when there isn't one required or listed on the BOL; a whole host of things I am finding lately.

1.

2.

3.

We've been having to file a lot of disputes with the carriers. They charge us sort and seg but the customer says they didn't require it and yet we were charged.

1.

2.

3.

Certain customers must have exit passes like CNS – in order to file a dispute.

1.

2.

3.

If they've got a drop ship or a container and they say there are multiple PO's on the BOL when they're really on the manifest, then someone made a mistake. We must file a dispute with CNS, and they require an exit pass and we must get that from the shipper.

1.

2.

3.

Retail has gotten bad. Warehouses have become profit centers, so we dot I's and cross t's to get all our paperwork right.

1.

2.

3.

The carriers seem like everything is OK for a while and then they start doing things strangely.

1.

2.

3.

A lot of people have banned FedEx Freight from their preferred carrier list. A lot of others have banned Estes.

1.

2.

3.

YRC has been giving me hiccups lately.

1.

2.

3.

Unfortunately, we must file disputes either with the carrier or the customer to dispute penalties. And that's one big thing I am looking for my brokers to do since I don't have relationships with the carriers.

1.

2.

3.

When the customer has a preferred carrier, that carrier gets preference for drop shipments, appointments, etc. They know the routine and the paperwork. They may be a little more expensive but it's worth it to avoid the headache.

1.

2.

3.

We have damage claims, too.... But it's not worth it to additionally insure. We are very careful about how we pack so there's not too many damage claims.

1.

2.

3.

It seems like it goes in cycles. These last 6 months have been horrible from a freight standpoint.

1.

2.

3.

That's why I don't switch brokers often. I get a relationship with someone and they know the requirements, they know the paperwork, and I want my broker to get all the paperwork from the shipper and put it on their website.

1.

2.

3.

My issues are more about the carriers not getting there on time, fines, sort and seg fees, lumping charges, etc.

1.

2.

3.

All our products are sort and seg per the requirements of the customer so there's no reason – and it's all documented.

1.

2.

3.

They asked us to sort and seg and I called the customer and they say NO, if it's sort and seg it will say so. If not, there's no reason.

1.

2.

3.

Role Play: Prospecting 1.1 - Instructor Directions

The purpose of this role play is to give new hires an opportunity to practice getting qualifying information while prospecting.

Instructions:

1. Make sure all reps have pen and paper.
2. Break the reps into groups of three. There will we three roles within each group: Rep, Receptionist, and Observer.
3. Explain the exercise and the purpose of the exercise.
4. Determine who will be the Rep, Receptionist, and the observer to start in each group. (After each "call" the roles will rotate. Whoever played the Rep will now play the Receptionist, whoever played the receptionist will now play the Observer, and whoever played the Observer will now be the rep.)
5. GO!!!

Make sure the reps understand that they are supposed to only give information that is asked for! Also, make sure the reps understand that if the information is **(Bolded in Parentheses)** that they give a LITTLE push back before giving the rep that information.

Role Play 1.1

The rep will call, the receptionist will answer the phone. You will play the receptionist. You will answer the phone and say *"Hello, this is (Company name)."* Deny reps request, say… *"They are not available right now; I may be able to help you."* As the receptionist you know all the qualifying information. It is the rep's job to get if from you! If information is in **(BOLD)** give the rep some pushback. Don't give them the information they are requesting the first time they ask. Make them work a little for the answer they are

1.   Company name: Cup Press

DM Name & Title: Sam Peterson, Shipping Manager

LTL/TL: LTL

Volume: 2 a week

Pay for Shipping: Yes

2.   Company Name: Danley Flooring

DM Name & Title: Kara Danley, Owner

LTL/TL: LTL and TL **(split evenly)**

Volume: 8 a week

Pay for Shipping: Yes

3.   Company Name: Tile Pro's

DM Name & Title: Dante Master, Shipping manager

LTL/TL: TL

Volume: 1-2 a Month

Pay for Shipping: Yes

4.   Company Name: Foam and More

DM Name & Title: Harrison Forbes, **(GM)**

LTL/TL: TL

Volume: 8-10 a week

Pay for Shipping: Yes

5. Company Name: Metal man's

DM Name & Title: Jim Cams, **(Owner)**

LTL/TL: LTL and TL

Volume: 2 LTL and 3 TL a week

Pay for Shipping: Yes

6. Company Name: Fixtures Plus

DM Name & Title: Mike **(Smith, Logistics Manager)**

LTL/TL: TL

Volume: 10 a week

Pay for Shipping: Yes

Role Play: Prospecting 1.2 - Instructor Directions

The purpose of this role play is to give new hires an opportunity to practice getting qualifying information while prospecting. This time they are going to be transferred to the Primary Shipping Contact to get the information. They are also going to get more push back when asking for information than in role play 1.1.

Instructions:

1. Make sure all reps have pen and paper.
2. Break the reps into groups of three. There will we three roles within each group: Rep, Receptionist, and Observer.
3. Explain the exercise and the purpose of the exercise.
4. Determine who will be the Rep, Primary Shipping Contact (PSC), and the observer to start in each group. (After each "call" the roles will rotate. Whoever played the Rep will now play the Receptionist, whoever played the receptionist will now play the Observer, and whoever played the Observer will now be the rep.)
5. GO!!!

Make sure the reps understand that they are supposed to only give information that is asked for! Also, make sure the reps understand that if the information is **(Bolded in Parentheses)** that they give a LITTLE push back before giving the rep that information.

Role Play 1.2

The same scenario will happen from role play 1.1 but this time the receptionist will say, *"One moment, let me transfer you."* Then the PSC (primary shipping contact) will answer the phone. You will play the receptionist and the PSC. The PSC will answer the phone and say, *"(Company name)"*. It is the rep's job to get all the information from you! If information is in **(BOLD)** give the rep some pushback when they are asking for this information. Make them work a little for the answer they are looking for. Go!

1. Company Name: All Parts

DM Name & Title: William **(Jones, Shipping Coordinator)**

LTL/TL: LTL

Volume: Weekly **(3 a week)**

Pay for Shipping: Customer routed

2. Company Name: Sweet Tooth's

DM Name & Title: Austin White, **(VP of Logistics)**

LTL/TL: Reefer **(LTL)**

Volume: 4 a week

Pay for Shipping: Yes

3. Company Name: Naples Paint Supplies

DM Name & Title: Erica **(Shields)**, Owner

LTL/TL: LTL

Volume: 3 a week

Pay for Shipping: Pay for half

4. Company Name: Ball Makers

DM Name & Title: Tom **(Bradly)**, Shipping manager

LTL/TL: Flatbed

Volume: 10 a week

Pay for Shipping: Yes

5. Company Name: Broadways

DM Name & Title: **(Albert Books)**, Warehouse manager

LTL/TL: International LCL

Volume: 2 a week

Pay for Shipping: No

6. Company Name: Sparky's Brackets

DM Name & Title: Lisa Brown, **(shipping Coordinator)**

LTL/TL: LTL and TL **(split evenly)**

Volume: Weekly **(6 a week)**

Pay for Shipping: No

Role Play 1.2

The same scenario will happen from role play 1.1 but this time the receptionist will say, **"One moment, let me transfer you."** Then the DM will answer the phone. You will play the receptionist and the DM. The DM will answer the phone and say, **"(Company name)".** As the DM you know all the information. It is the rep's job to get if from you! If information is in **(BOLD)** give the rep some pushback when they are asking for this information. Make them work a little for the answer they are looking for. Go!

7. Company Name: Saturn Overhead Equipment

DM Name & Title: Richard **(Makers, Shipping manager)**

LTL/TL: TL

Volume: Couple time a month **(1-2 a Month)**

Pay for Shipping: Yes

8. Company Name: Planters Food

DM Name & Title: Josh **(Hands, GM)**

LTL/TL: Reefer **(TL)**

Volume: 8-10 a week

Pay for Shipping: Yes

9. Company Name: Vision Paper

DM Name & Title: Alice **(Fisher, Shipping manager)**

LTL/TL: LTL and TL

Volume: We ship a lot (2 LTL and 3 TL a week)

Pay for Shipping: Yes

10. Company Name: Withers Farms

DM Name & Title: Mike **(Smith, Owner)**

LTL/TL: TL

Volume: (Weekly) 10 a week

Pay for Shipping: Pay for half

11. Company Name: Marko's T-Shirts

DM Name & Title: Roy **(Glenn, VP of Logistics)**

LTL/TL: LTL

Volume: Monthly **(30 a Month)**

Pay for Shipping: What do you mean? **(Customer routed)**

12. Company Name: Tire Stock

DM Name & Title: Austin **(White, VP of Production)**

LTL/TL: LTL Reefer

Volume: Every week **(4 a week)**

Pay for Shipping: Yes

Role Play 1.2

The same scenario will happen from role play 1.1 but this time the receptionist will say, *"One moment, let me transfer you."* Then the DM will answer the phone. You will play the receptionist and the DM. The DM will answer the phone and say, *"(Company name)".* As the DM you know all the information. It is the rep's job to get if from you! If information is in **(BOLD)** give the rep some pushback when they are asking for this information. Make them work a little for the answer they are looking for. Go!

13. Company Name: Outdoor Plastics

DM Name & Title: Erica **(Shields)**, Owner

LTL/TL: LTL

Volume: We don't ship that much **(3 a week)**

Pay for Shipping: We select which carrier to use **(No, the invoices are sent to the vendors)**

14. Company Name: Dockers Doors

DM Name & Title: **(Amy Bridles)**, Shipping manger

LTL/TL: Flatbed TL

Volume: We ship everyday **(10 a week)**

Pay for Shipping: Yes

15. Company Name: The Container Shop

DM Name & Title: Ricky **(Mable, Shipping manager)**

LTL/TL: LTL/TL **(75% TL)**

Volume: We ship multiple times a day (1-2 a day)

 Pay for Shipping: Yes

16. Company Name: Polly's Machines

DM Name & Title: **(Matt Push)**, Shipping Coordinator

LTL/TL: TL

Volume: **(We don't ship that much)** 1 a day

Pay for Shipping: We pass on the freight charges to our customers **(Yes)**

Role Play: Qualifying 1.3 - Instructor Directions

The purpose of this role play is to give new hires an opportunity to practice getting information while qualifying. The rep will be transferred to the Primary Shipping Contact. They are also going to get more push back when asking for information than in role play 1.2.

Instructions:

1. Make sure all reps have pen and paper.
2. Break the reps into groups of three. There will we three roles within each group: Rep, Receptionist, and Observer.
3. Explain the exercise and the purpose of the exercise.
4. Determine who will be the Rep, Primary Shipping Contact (PSC), and the observer to start in each group. (After each "call" the roles will rotate. Whoever played the Rep will now play the Receptionist, whoever played the receptionist will now play the Observer, and whoever played the Observer will now be the rep.)
5. GO!!!

Make sure the reps understand that they are supposed to only give information that is asked for! Also, make sure the reps understand that if the information is **(Bolded in Parentheses)** that they give a LITTLE push back before giving the rep that information.

Role Play 1.3

The rep will call and get transferred to the PSC. It is the rep's job to get the info from you! If information is in **(BOLD)** give the rep some pushback when they are asking for this information. Make them work a little for the answer they are looking for. Go!

1.   Company Name: Cup Press

PSC Name & Title: Sam **(Peterson)**, Owner

LTL/TL: LTL

Volume: Weekly **(2 a week)**

Pay for Shipping: Yes

Identify Lanes, Regions, Locations: We Ship all over **(Westcoast)**

Mode/Equipment: Van

Providers: Clear Lane, Old Dominion, FedEx

Commodity & Value: Plastic Cups, < $7,000

Special Requirements: lift gates

Booking Process: Shipping manager sends quote request to carriers then selects cheapest quote that meets customer needs.

2.   Company Name: Danley Flooring

PSC Name & Title: Kara **(Danley)**, Shipping Manager

LTL/TL: LTL and TL **(split evenly)**

Volume: 8 a week

Pay for Shipping: Yes

Identify Lanes, Regions, Locations: PA to GA

Mode/Equipment: Van

Providers: **(TQL)**

Commodity & Value: Finished wood Flooring, < $15,000

Special Requirements: Delivery Appointments needed

Booking Process: Kara emails TQL rep shipping info to book shipments, doesn't require quotes.

Role Play 1.3

The rep will call and get transferred to the PSC. It is the rep's job to get the information from you! If information is in **(BOLD)** give the rep some pushback when they are asking for this information. Make them work a little for the answer they are looking for. Go!

3. Company Name: Tile Pro's

PSC Name & Title: Dante **(Masters)**, Shipping Coordinator

LTL/TL: TL

Volume: All the time **(8-12 a Month)**

Pay for Shipping: Yes

Identify Lanes, Regions, Locations: VA to CA & AZ

Mode/Equipment: Van

Providers: We have a few **(Ryder, Arrive, YRC)**

Commodity & Value: Tile < $50,000

Special Requirements: No crazy requirements **(Appointments at Pick and Delivery)**

Booking Process: Donte calls providers for quotes and emails shipping information to provider with lowest quote

4. Company Name: Vision Paper

PSC Name & Title: Alisha **(Fisher)**, Logistics Manager

LTL/TL: Mostly LTL **(and TL)**

Volume: 2 LTL a day and 3 TL a week

Pay for Shipping: Yes

Identify Lanes, Regions, Locations: LA to TX & AL

Mode/Equipment: Van

Providers: We have a few we use **(SAIA, UPS, Southeastern for LTL, a few local carriers for TL)**

Commodity & Value: Office Supplies

Special Requirements: Appointments

Booking Process: Alisha sends email to providers for LTL and goes with lowest cost. She calls local TL providers to see who has capacity and books first available.

Role Play 1.3

The rep will call and get transferred to the PSC. It is the rep's job to get the information from you! If information is in **(BOLD)** give the rep some pushback when they are asking for this information. Make them work a little for the answer they are looking for. Go!

5.   Company Name: Restaurant Restock

PSC Name & Title: Noel **(Rambles)**, Owner

LTL/TL: Yes, we ship **(LTL)**

Volume: All the time **(3 a week)**

Pay for Shipping: I wish we didn't! **(Yes)**

Identify Lanes, Regions, Locations: TX to AL, PA, & VA

Mode/Equipment: Van

Providers: Echo

Commodity & Value: Plastic ramekins & bowls

Special Requirements: We order lift gates and go to schools mostly **(Limited access)**

Booking Process: "Our Shipping manager sends quote request to rep at Echo and forwards the quotes to our customers. Once our customers approve the quotes the shipping manager sends the shipping details to the rep at Echo."

6.   Company Name: Ron's Machine and Pump

PSC Name & Title: Mike **(Lenora)**, Shipping Manager

LTL/TL: LTL and TL **(75% TL)**

Volume: everyday **(8 a week)**

Pay for Shipping: Our customers pay **(Yes)**

Identify Lanes, Regions, Locations: All over the US. **(FL to East coast and Midwest)**

Mode/Equipment: Mostly Vans **(some flatbeds)**

Providers: We're all good with who we use. **(FedEx for LTL, Arrive and C.H. for TL)**

Commodity & Value: Machinery and pumps

Special Requirements: Tarps

Booking Process: "I email FedEx for LTL quotes. Once orders are approved by customers, I send FedEx the shipping information. I call Arrive and C.H. for TL quotes. I Send the quotes to our customers for approval then email the shipping info to the broker with best rate."

Role Play 1.3

The rep will call and get transferred to the PSC. It is the rep's job to get the information from you! If information is in **(BOLD)** give the rep some pushback when they are asking for this information. Make them work a little for the answer they are looking for. Go!

7. Company Name: Party Plants

PSC Name & Title: Kari **(Mosser)**, Sales Manager

LTL/TL: TL

Volume: Every week **(2 a day)**

Pay for Shipping: Yes

Identify Lanes, Regions, Locations: WY to IA & MN

Mode/Equipment: Hot Shots **(Flatbed)**

Providers: Local Hotshot providers

Commodity & Value: Plants

Special Requirements: None

Booking Process: What do you mean? **(Kari calls local TL carriers to see who has available capacity. "Take the first hotshot we can get!".)**

8. Company Name: Quality Meats

PSC Name & Title: Hunter **(Huntington III)**, Owner

LTL/TL: Yes **(LTL and TL)**

Volume: 1 LTL a week, 3 TL a week

Pay for Shipping: What do you mean? **(Yes)**

Identify Lanes, Regions, Locations: New Mexico to AZ, CO, TX, CA

Mode/Equipment: Temp trucks **(Reefer)**

Providers: Maverick USA, CRST international, Interstate Distributors

Commodity & Value: Meat products

Special Requirements: Just the regular stuff **(Truck temp cannot exceed 30 degrees)**

Booking Process: We call to see who has trucks… **(Shipping manager calls Maverick first to see if they have capacity, if not they call their other carriers to see who has available capacity. First with capacity at a reasonable price gets the load.)**

Obstructions VS Objections

Instructions: Identify if the response from the gatekeeper is an obstruction or an objection. Circle the correct answer.

1. "Mrs. Floes is busy right now…"   Obstruction/Objection

2. "We are not interested…"   Obstruction/Objection

3. "We don't use brokers."   Obstruction/Objection

4. "I'm sorry, I can't give you that information."   Obstruction/Objection

5. "We don't take sales calls."   Obstruction/Objection

6. "We just switched companies last month."   Obstruction/Objection

7. "We don't ship that often…"   Obstruction/Objection

8. "The owner said he is not interested…"   Obstruction/Objection

9. "Corporate dictates that we only use asset-based carriers"   Obstruction/Objection

10. "We get an 80% discount with our current carrier, no thank you."   Obstruction/Objection

Matching Features to Benefits

Instructions: Match the features with the benefits! Write the number of the benefit on the line next to the feature it matches.

Feature	Benefits
_____ Bundled Transportation Services	Simplifies reconciling invoices and reduces time matching invoices against shipment data
_____ Automation	Reduce wasteful spending and time researching incorrect invoices and disputing carriers
_____ Freight Management (single source)	Faster claims processing gets you paid more money faster
_____ Carrier procurement	Reduce time spent on manual processes such as obtaining multiple quotes
_____ Single, comprehensive invoice	Knowledgeable and familiar across all modes increasing service quality and carrier accountability
_____ Freight bill auditing	Identify regional or seasonal trends for budgeting or marketing purposes
_____ Cargo Insurance	Single source choice, simplicity, and expertise across multiple modes
_____ Inbound vendor management	Reduces labor cost and provides better visibility of inbound shipments
_____ Reporting & visibility	Leverage buying power and reduce manual work procuring trucks
_____ Dedicated support	Maximize supply chain optimization allowing scalability and focus on core competencies

Matching Features to Descriptions

Instructions: Match the features with the descriptions! Write the number of the description on the line next to the feature it matches.

Feature	Description
_____ Bundled Transportation Services	Constant LTL contract evaluation and negation. Truckload lane negotiation, bid management, and carrier vetting
_____ Automation	
_____ Freight Management (single source)	Consolidated weekly invoice of all shipments, from all providers, from all modes
_____ Carrier procurement	3rd party insurance for LTL and Truckload shipments
_____ Single, comprehensive invoice	Managed inbound shipping
_____ Freight bill auditing	Efficient shipping process for quoting, carrier selection and shipment execution
_____ Cargo Insurance	Single point of contact for supporting day to day freight activities
_____ Inbound vendor management	
_____ Reporting & visibility	Providing a single point of contact for LTL, Full Truckload (Flatbed, Reefer, Rail, etc.), Volume, Partial, Air & Ocean
_____ Dedicated support	Automated visibility of all shipment activity across all modes
	Single source: shipment execution, tracking, address books, product books, invoicing, and customer service
	Pre-invoice auditing for errors and discrepancies

Matching Problems to Benefits

Instructions: Match the problems with the benefits! Write the number of the benefit on the line next to the problem it matches.

Problem	Benefits
_____ Spends excessive time manually compiling quotes from multiple carriers	Simplifies reconciling invoices and reduces time matching invoices against shipment data
_____ Has high labor cost due to complexity of inbound shipments	Reduce wasteful spending and time researching incorrect invoices and disputing carriers
_____ Waits months to get paid by the carrier for freight damages	Faster claims processing gets you paid more money faster
_____ Gets left on hold for excessive periods of time, only to speak to a carrier representative who is unfamiliar with their freight and needs	Reduce time spent on manual processes such as obtaining multiple quotes
_____ Spends excessive time compiling and paying carrier invoices	Knowledgeable and familiar across all modes increasing service quality and carrier accountability
_____ Spends more time managing logistics than focusing on manufacturing quality products	Identify regional or seasonal trends for budgeting or marketing purposes
_____ Spends excessive time auditing carrier invoices and frequently overpays providers	Single source choice, simplicity, and expertise across multiple modes
_____ Has shipping errors sending information to multiple providers for all their shipping modes	Reduces labor cost and provides better visibility of inbound shipments
_____ Calculates inaccurate forecasts and budgets	Leverage buying power and reduce manual work procuring trucks
_____ Has missed pickups and volatility to high prices due to a lack of capacity	Maximize supply chain optimization allowing scalability and focus on core competencies

Matching Problems to Features

Instructions: Match the problems with the features! Write the number of the feature on the line next to the problem it matches.

Problem	**Feature**
_____ Spends excessive time manually compiling quotes from multiple carriers	Bundled Transportation Services
_____ Has high labor cost due to complexity of inbound shipments	Freight bill auditing
_____ Waits months to get paid by the carrier for freight damages	Freight Management (single source)
_____ Gets left on hold for excessive periods of time, only to speak to a carrier representative who is unfamiliar with their freight and needs	Reporting & visibility
_____ Spends excessive time compiling and paying carrier invoices	Single, comprehensive invoice
_____ Spends excessive time managing logistics	Automation
_____ Spends excessive time auditing carrier invoices	Cargo Insurance
_____ Has shipping errors due to confusion using different providers for their LTL, Truckload, and expedite shipments	Carrier procurement
_____ Calculates inaccurate forecasts and budgets	Dedicated support
_____ has missed pickups and volatility to high prices due to a lack of capacity	

Matching Situations to Problems

Instructions: Match the situations with the problems! Write the number of the problem on the line next to the situation it matches.

Situation	Problem

Situation

_____ Using different providers for each mode

_____ Splitting focus between managing

   manufacturing and transportation

_____ Receiving invoices from multiple carriers

_____ Shipping medium to high value goods but not

   adding insurance

_____ Managing inbound freight

_____ Sending out an email blast for quotes

_____ Exceeding annual shipping budgets

_____ Shipping domestic TL direct with two carriers

_____ Calling multiple providers for customer

   service

_____ Auditing carrier invoices

Problem

Spends excessive time manually compiling quotes from multiple carriers

Has high labor cost due to complexity of inbound shipments

Waits months to get paid by the carrier for freight damages

Gets left on hold for excessive periods of time, only to speak to a carrier representative who is unfamiliar with their freight and needs

Spends excessive time compiling and paying carrier invoices

Spends more time managing logistics than focusing on manufacturing quality products

Spends excessive time auditing carrier invoices and frequently overpays providers

Has shipping errors sending information to multiple providers for all their shipping modes

Calculates inaccurate forecasts and budgets

Has missed pickups and volatility to high prices due to a lack of capacity

Funnel Management Exercise

Read the synopsis and determine if it is a:

- Lead
- Prospect
- Qualified Prospect
- Opportunity
- Commitment
- Activation
- Customer
- Fall Back

1. Business ships 8-10 TL per week, Decision Maker is Bill Johnson, Owner. Referred to speak to him to find out if they pay for the freight or not. _____

2. Business ships 8-10 TL per week, they pay for it and the Decision Maker is Bill Johnson, Owner. All qualifying points acquired except you are waiting on them to send you their 'lane sheet' as promised. _____

3. Business ships 8-10 TL per week, they pay for it, Decision Maker is Bill Johnson, Owner. All qualifying points acquired. In conversations with the Shipping Manager, we would be a strong fit and he agrees. On first attempt to engage with Bill Johnson he referred you to talk to the shipping manager and got off the phone. _____

4. Business ships 8-10 TL per week, they pay for it, Decision Maker is Bill Johnson, Owner. We acquired all qualifying information except for who we are competing against and their process for quoting and booking shipments. The shipping manager, however, sent you an email asking for quotes. He included all shipment information and delivery requirements as well as the price to beat. _____

5. Business ships 8-10 TL per week, they pay for it, Decision Maker is Bill Johnson, Owner. We acquired all qualifying information and determined we are a fit for each other. You speak at length with Bill Johnson and do a thorough needs assessment. You presented your solution which included 3 different value-add wins. Bill provides you with their invoices and we are cost competitive. Bill is eager to begin but is in the middle of opening a new warehouse, so he commits to begin shipping at the end of August. _____

6. Business ships 3 truckloads per week that they pay for and while the Business Owner is Bill Johnson, you are engaged with the Director of Shipping. The account is fully qualified, and you conducted an appropriate needs investigation. They completed a credit application, and let you quote a couple of last week's shipments. While cost competitive, you will not win every shipment. Director of shipping tells you that she will have to quote the other broker each time as well, but you think you will win 2 shipments per week. After about a month, that seems to be the case. _____

7. Business ships 8-10 TL per week, they pay for it, Decision Maker is Bill Johnson, Owner. We acquired all qualifying information and determined we are a fit for each other. You speak at length

with Bill Johnson and do a thorough needs assessment. You presented your solution which included 3 different value-add wins. Bill provides you with their invoices and we are cost competitive on 2 lanes (4 shipments per week) but way too high on the other. Bill commits those two lanes to you and a month later it looks like that's what happened. _____

8. Business ships 3-4 LTL/TL per week – you fully qualify the account. You are engaged with the Director of shipping who allows you to conduct an appropriate needs investigation. They allow you to quote on this week's shipments where you were competitive on all 4. They tell you they will fill out the credit app and will let you quote on next week's and will award them to you if your price has not changed. _____

9. Business ships 8-10 TL per week, they pay for it, Decision Maker is Bill Johnson, Owner. We acquired all qualifying information and determined we are a fit for each other. You speak at length with Bill Johnson and do a thorough needs assessment. You presented your solution which included 3 different value-add wins. Bill provides you with their invoices and we are cost competitive on all 4. Bill completes the credit app, commits the lanes and begins shipping. On the 3rd week, however, a service-related issue occurs, and they stop. Several weeks has gone by and they are no longer taking your calls. You think you can still get them back on board, though. _____

10. Business ships 8-10 TL per week, they pay for it, Decision Maker is Bill Johnson, Owner. We acquired all qualifying information and determined we are a fit for each other. You speak at length with Bill Johnson and do a thorough needs assessment. You presented your solution which included 3 different value-add wins. Bill provides you with their invoices and we are cost competitive on all 4. Bill completes the credit app, commits the lanes and begins shipping. On the 3rd week, however, a service-related issue occurs, and they stop. Several weeks has gone by and they are no longer taking your calls. Finally, Bill emails you to tell you they are no longer interested in resuming a relationship and to please disengage. _____

11. Business ships 8-10 TL per week, they pay for it, Decision Maker is Bill Johnson, Owner. We acquired all qualifying information except for who we are competing against and their process for quoting and booking shipments. The shipping manager, however, sent you an email asking for quotes. He included all shipment information and delivery requirements as well as the price to beat. We beat the quotes. The shipping manager gets the credit app signed by their accounting department and begins shipping with you. _____

12. Business ships 8-10 TL per week, they pay for it, Decision Maker is Bill Johnson, Owner. We acquired all qualifying information and determined we are a fit for each other. You speak at length with Bill Johnson and do a thorough needs assessment. You presented your solution which included 3 different value-add wins. Bill provides you with their invoices and we are cost competitive on all 4 for all 8-10 weekly shipments. Bill completes the credit app, commits the lanes and begins shipping. The first week you get 4 of the 8 shipments. The second week you get 5 of the 8 shipments. The third week you get 4. _____