



# So You've Been Asked to the Table ...Now What?

Strategies for Gaining Buy-In for RIM



- Learn from the mistakes of others.  
You can't live long enough to make  
them all yourself.

~Unknown



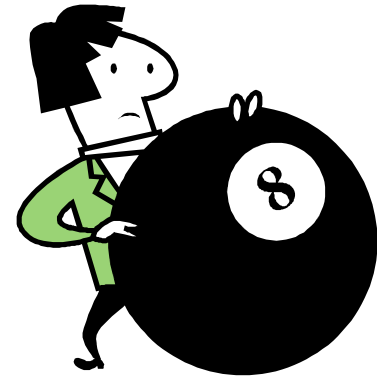
# Agenda

- Selling 101
- Understanding others
- Understanding you
- Selling RIM – a paradigm shift
- Put it all together



# Selling 101: What to Sell

- Customers want a solution to their problem, not a product/idea/etc.
- Speak their language. Give them the answer to “WIIFM?”





# Selling 101: Benefits vs. Features

- **Always sell Benefits**
  - Describe the need the “product” will immediately fulfill
  - Offer a vision of the satisfied customer
  
- **What are the BENEFITS of the features?**



# Selling 101: Benefits vs. Features

- Take your “features” and translate them into “benefits”
  - *Barcoding* = Faster access to needed info
  - *Destruction* = Containing costs and keeping “info clutter” in check
  - *Proper filing* = Promote collaboration and information re-use (increased productivity)



# Selling 101: Perspective

- **Enthusiasm.** Don't be afraid to tell people you LOVE your product, but don't be blinded by your affection and lose objectivity. Not everyone will LOVE it (but the good news is, you don't need them to!)
- **Keep it SIMPLE.** RIM isn't rocket science, and you're not a rocket scientist – so don't pretend. Simple sells, especially to the “uninitiated”



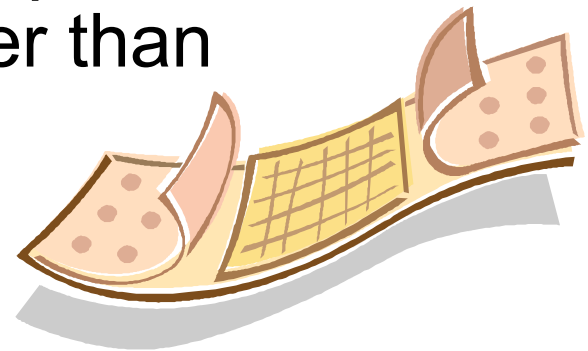
# Selling 101: Competing

## ○ What's your USP?

- Understand your competition and what they're likely to be selling – then figure out why you're more important. (HINT: Sometimes, you won't be!)

## ○ Suitability and Superiority

- How does it solve the problem, and how does it do it better than everyone else?





# The Role of Understanding: Others

- Understand others first, then be understood.





# The Role of Understanding: Others

- Who Are the Players?
  - Board of Directors
  - C-Level
    - CEO, COO, CIO, CFO, CTO, etc.
  - Senior Management
    - VP, SVP, EVP, Director, etc.
  - Other influential players
    - Partners, Senior Line Management, etc.



# The Role of Understanding: Others

What Do the Players Care About?

- **Cost**
- **Profitability**
- Risk Exposure
- Security
- **Cost**
- Productivity
- **Profitability**
- **Profitability**
- Compliance
- **Cost**
- Culture
- Reputation
- Value
- Oh yeah, and **cost and profitability!**



# The Role of Understanding: Others

## Which Players Care About What?

- Board of Directors
  - Profitability
  - Reputation
  - Risk Exposure
  - Value
- C-Level
  - All of the above, plus
  - Cost
  - Compliance
  - Culture
- Senior Management
  - All of the above, plus
  - Productivity
  - Security



# The Role of Understanding: Others

- **Know your audience**

- Are they **THE** decision makers? Or just “recommenders”?
  - Champion vs. Buyer
  - Consensus vs. Commitment



# The Role of Understanding: Others

- **Know your audience**
  - Focus on those who you have the best chance of “**winning**” (and, of course, who are worth winning!)



# The Role of Understanding: Others

- **Know your audience**

- Do the individuals have **competing agendas**?
  - Can you reconcile them, or give a little to each?



# The Role of Understanding: Others

- **Did you get asked to speak, or is this your idea?**
  - If asked, what, exactly, did they ask for?
  - It's OK to deviate from what they asked for and try to sell something else, but be prepared to explain **WHY** you think they need this product over what they asked for.



# The Role of Understanding: You

- I can win an argument on any topic, against any opponent. People know this, and steer clear of me at parties. Often as a sign of their great respect, they don't even invite me.

~Dave Berry



# The Role of Understanding: You

- **Know** your strengths, weaknesses, quirks and tendencies
- **Emotional Intelligence**
  - Salovey & Mayer definition: “... the ability to monitor one’s own and others’ feelings and emotions, to discriminate among them and to use this information to guide one’s thinking and actions.”  
*Emotional Intelligence*, 1990.

# The Role of Understanding: You

- **Emotional Intelligence, continued**
  - Allows us the ability to **choose** how we think, feel and act
  - **Critical** skills when facing opposition/criticism





# The Role of Understanding: You

## ○ The Pitch

### ● Be prepared

- If you need written notes, then have them.  
If you fiddle with your hair, wear it up.

### ● Be practiced (but not stiff!)

- Know your presentation but be ready to mix it up – real life rarely goes as planned



# The Role of Understanding: You

## ○ The Pitch

- Be ready for the **Curve Ball**
  - Hear the objection out and **don't interrupt.**
  - **DON'T PANIC!!** Good news is, they've been listening, or else they wouldn't have spoken up!
  - **Validate** SOMETHING
  - **Calmly respond**, either with an answer or ask a clarifying question in return

# Selling RIM: A Paradigm Shift

## ○ Yesterday

- Doom and Gloom, Fire and Brimstone, Do or **DIE!**
  - Compliance
  - Audit
  - Litigation





# Selling RIM: A Paradigm Shift

- Insanity: Doing the same thing over and over again and expecting different results.

~Albert Einstein

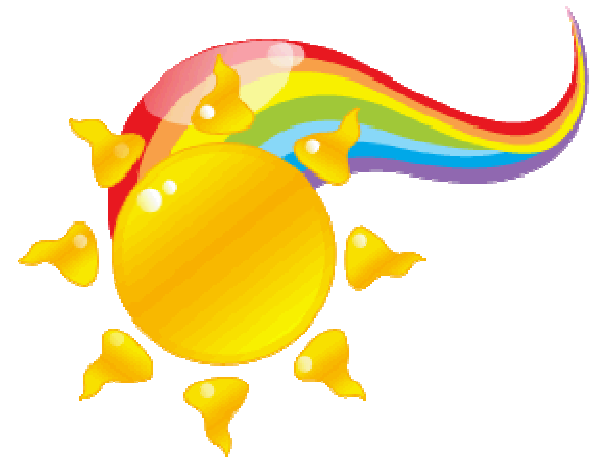


# Selling RIM: A Paradigm Shift

## ○ Today

### ● Rainbows and Sunshine

- Agility
- High Morale
- Strategic Alignment
- Collaboration





# Selling RIM: A Paradigm Shift

## ○ Key Value Points/Benefits

- Increased productivity
- Competitive advantage
- “Agility” in decision making
- Align operations to overall strategic plan, mission and vision statements



# Selling RIM: A Paradigm Shift

## ○ Cost

- Present in **simple terms** (preferably graphical representations)
- Address **revenue supporting** benefits
- Include **ROI** and **TCO** summaries
- Break out Capital vs. Expense and Project vs. Operational
- Have detailed financial analysis prepared **as a take-away**



# **Selling RIM: A Paradigm Shift – Example 1**

- The Firm needs to invest resources to develop a formal Records and Information Management Policy and Program.



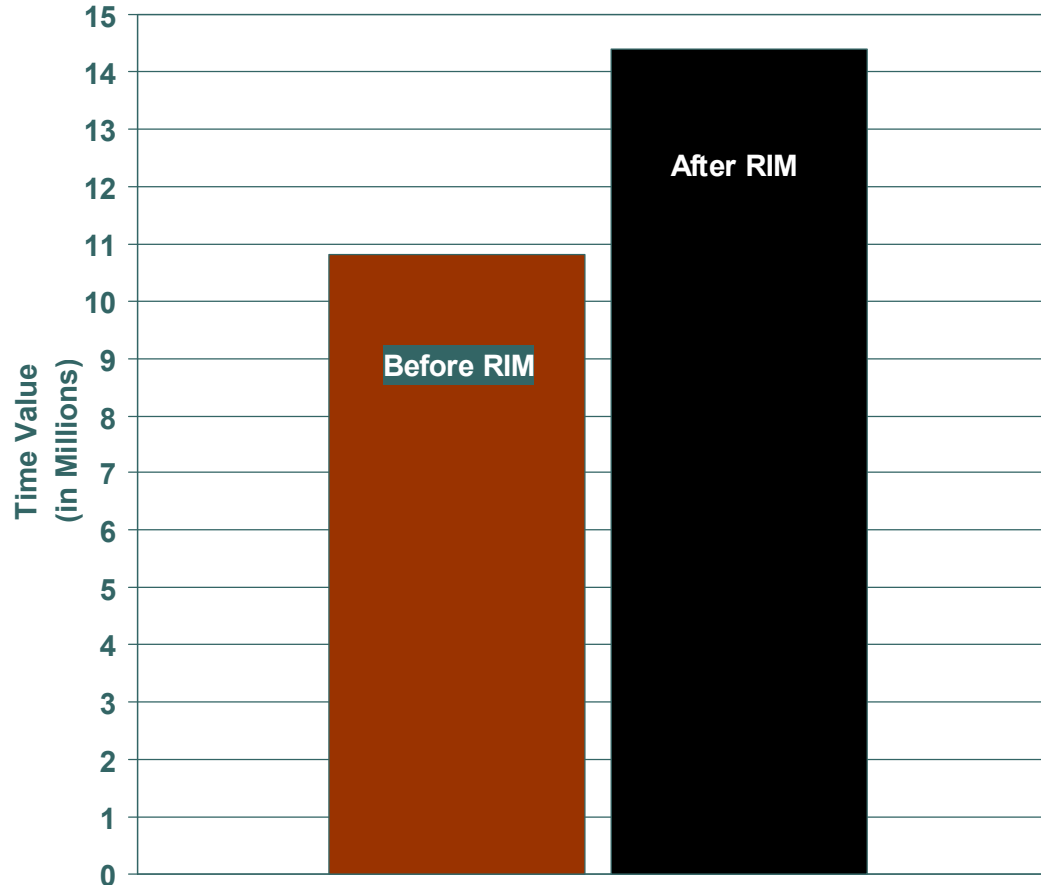
# Selling RIM: A Paradigm Shift – Example 1

- Argument:
  - Due to a lack of information management policy and procedure, the Firm is realizing a loss of potential revenue.
- Assumptions:
  - Partners are spending an average of 20 minutes each day unsuccessfully searching for information due to poor classification.
  - The average bill rate for Partners is \$300 per hour.



# Selling RIM: A Paradigm Shift – Example 1

## RIM Impact on Revenue Generation

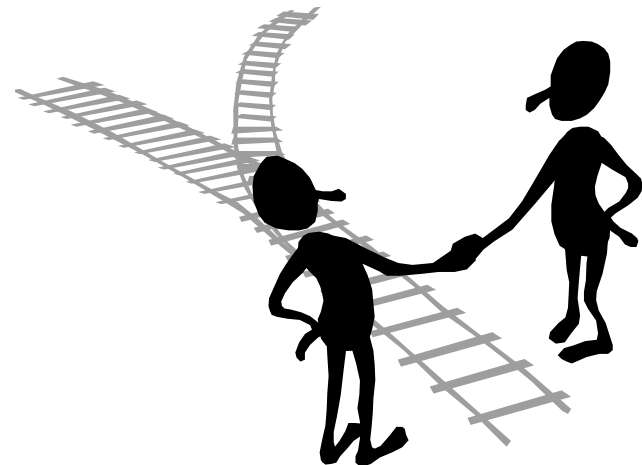




# Selling RIM: A Paradigm Shift

## ○ Compromise

- Sell the **Ideal** but be prepared to compromise
- Good vs. Great should really be **Good, on our way to Great**





# Selling RIM: A Paradigm Shift

## ○ Closing the “Sale”

- **Recap** why you’re there and the key benefits of your proposal
- Use the “**Presumptive Close**” technique
- If you can’t get commitment right there, don’t leave without **confirming next steps**
- Put a **deadline** on the decision if at all possible, and inform them if the costs will change due to delay

# Selling RIM: A Paradigm Shift

- **Failure** (sometimes it's inevitable!)
  - You won't win 'em all and ***that's okay!***
  - **Learn** from your mistakes
  - **Record** the top objections and **be prepared** for next time
  - ***Don't take it personally!***





# Putting It All Together

## ○ Prep

- Be enthusiastic!
- Know you, your tendencies, your gut, and be prepared to manage those to your benefit
- Know what's keeping your audience up at night
- Adapt your pitch to solve at least one of your audience's pressing issues
- Have the details at hand, but keep the presentation SIMPLE!



# Putting It All Together

## ○ Pitch

- Sell benefits, not features
- Set yourself apart from your competition
- Be prepared to negotiate, persuade and compromise – know what objections and questions will arise and have your answer ready
- Ask for the Sale!



# Putting It All Together

## ○ Post Sale

- Immediately follow up on any unanswered questions
- If you failed
  - Memorialize the Pitch to use the next time, noting the good **and** the bad
- If you Succeeded
  - Get To Work!!



● ● ● | Questions?



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