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Why Should a Sales Professional Set Proper Expectations?

About two years ago, a Sales VP of a service company was complaining about one of his sales people. He said he shares too much information early in the sales process. The quote that surprised me was: “Chris, you and I both know that you reset the expectations of the customer after the sale”.

One of the rules I follow in life is to listen to smart people who disagree with me; so as much as I disagreed, I pondered his comment for a couple of months. After applying his theory to many examples, I concluded that he was completely wrong.

Below are four reasons why it is very important to set the expectations of your clients.

Surprises Kill Relationships... and Reputations

There are dozens of “ultimate goals” of the sales profession, but one that stands out to me is to have my phone ringing with referred prospects and repeat clients. High prices, limited features, or long delivery times might challenge your sale; but surprises will kill your relationships... and eventually your reputation.

A former coworker and friend recently closed on a house. One hour before the closing her realtor told her that she needed to bring an extra \$9,000 cashier’s check to the closing to cover a lien. She had the money and felt the house was still a fair deal, but the surprise is what angered her. After a year of building a professional relationship, the realtor lost any possible repeat business and referrals in one minute.

Setting expectations early would’ve kept this situation positive. In fact, with all the nightmare house closings we hear about today, my friend would’ve widely shared the story of “my realtor was up front with me on everything – even a lien that might have ruined the deal”.

Your Prospect is Probably Intelligent

Since you’re reading this paper, you are likely involved in a sophisticated sales process and sell something that costs more than \$1000. If so, then your prospect is smart enough to know most of the expectations that you should be setting.

About 20 years ago, during my first year of selling (it was actually my third or fourth month of selling); I blindly landed a large opportunity at a law office. After drafting the proposal, the prospect asked me “ok, one monthly payment and you guys cover everything on all my copiers and faxes?” My answer: “yes!”

Two weeks later he decided to go with our competitor. His reasoning was that he knew and confirmed later that toner was not included in the price – he was just testing me. I’ll never forget his comment to me: “I don’t think you lied to me Chris, I just don’t think you knew and I can’t risk any other additional costs you might not know about.” He was right.

If you’re working with the right contact, they know ahead of time what you should be telling them.



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The Competition Doesn't (hopefully)

It can be very frustrating to know that your competition is setting unrealistic expectations just to get the sale. However, this is a great opportunity to differentiate you as an expert and solution provider. Without specifically naming competitors, ask your prospect for time to set the proper expectations and show them the preparations and solutions you have for any obstacles.

A friend of mine who sells video analytics software won the biggest order of his life and his company's history simply by walking his prospect's sites and letting them know the realities of the false alarms and false negatives for each area. His competition made bold claims without doing their homework. Although he had the highest price, my friend won the order without debate because he set the right expectations.

In contrast, if the competition does an excellent job of setting expectations, it's even more imperative for you to be direct and open. There aren't many worse experiences in sales than appearing to be dishonest – and that's exactly how you'll appear if you don't set the right expectations and your competition does.

It's the Right Thing to Do

Ok, I understand that you're not reading this for a moral lesson, but setting proper expectations is just the right thing to do. Most of the high performing salespeople that I know dedicate themselves to their craft for more than just a paycheck – the great ones care about their clients and do the right thing.

A few years ago, a sales professional on my team hit a home run in a demo. The end-user was convinced, the system integrator was excited – the opportunity was ours to lose. Following the demo, the group started discussing the applications and we found out that most of the areas were not ideal for our technology – it would work, but the client would not get the same results as we showed in the demo. My salesperson did the right thing – he explained the difference and set the right expectations for their application. The result: we lost that sale, but because he did the right thing, the system integrator was very impressed and brought us significantly more sales over the next two years.

Sometimes the decision is that easy – it's the right thing to do.

In conclusion, you're building up or tearing down your career with every action you take. More times than not, you'll win sales by setting the proper expectations for your prospect, but even in times when competence and honesty might hurt you in the short term, it will always help you in the long run.

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