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What To **Expect**

**1** **Sixty** Minutes  
**Rapid** Fire  
**Q&A**  
**Recorded**



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**2** **Participate**



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The empowered buyer is very **demanding.**



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**What is hybrid selling?**  
Determining the right cadence, process, tools and technology to win the deal



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**20%**

In a 2021 survey by McKinsey, only **20%** of clients say they hope to **return to in-person sales.**

McKinsey & Company, 2020



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**Advantages of Hybrid Selling**

1. Faster response times and shorter sales cycles
2. More selling time
3. Easily recorded and reviewed for training purposes
4. Recruiting, retention, and motivational advantage
5. Less expensive
6. Fits the way customers want to buy



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**Is hybrid selling right for your team?**

Nearly all sales teams can leverage some aspect of the hybrid sales model for better results.



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**Creating a Hybrid Prospecting Process**



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The goal of a hybrid prospecting process is to connect with a prospect, introduce yourself, start a business conversation, and **determine if there is interest in solving a problem.**



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"Tell me about what you are looking for?"



"It looks like you were in the consideration stage to help solve this problem **two years ago**. It appears Mike, Courtney, and Dharmesh spent a lot of time **reviewing the product** back then. **Can you tell me what has changed?**"



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"Tell me about what you are looking for?"



"It looks like you were in the consideration stage to help solve this problem **two years ago**. It appears Mike, Courtney, and Dharmesh spent a lot of time **reviewing the product** back then. **Can you tell me what has changed?**"



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### Tips to Start a Hybrid Sales Process

1. Become familiar with your ideal customer profile and buyer personas.



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**Tips to Start a Hybrid Sales Process**

1. Become familiar with your ideal customer profile and buyer personas.
2. Find a quiet location.



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**Tips to Start a Hybrid Sales Process**

1. Become familiar with your ideal customer profile and buyer personas.
2. Find a quiet location.
3. Be aware of presentation.



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**Tips to Start a Hybrid Sales Process**

1. Become familiar with your ideal customer profile and buyer personas.
2. Find a quiet location.
3. Be aware of presentation.
4. Stand up when you make a phone call.



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### Tips to Start a Hybrid Sales Process

1. Become familiar with your ideal customer profile and buyer personas.
2. Find a quiet location.
3. Be aware of presentation.
4. Stand up when you make a phone call.
5. Practice your initial greeting:



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### Tips to Start a Hybrid Sales Process

1. Become familiar with your ideal customer profile and buyer personas.
2. Find a quiet location.
3. Be aware of presentation.
4. Stand up when you make a phone call.
5. Practice your initial greeting:
6. Determine if you're going to leave a voicemail.



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### A Few More Prospecting Tips

1. Research the target company.



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**A Few More Prospecting Tips**

1. Research the target company.
2. Define a connect call positioning statement.



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**A Few More Prospecting Tips**

1. Research the target company.
2. Define a connect call positioning statement.
3. Close for a discovery call.



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**How to Use Your Tech and Team to Create a Pre-Call Plan**



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**Missed Opportunities Preparing for a Call**

- Failure to:
  - Conduct their pre-call research; relying solely on "experience"
  - Get the right people to attend the meeting
  - Set an agenda and align expectations
  - Confirm the meeting and provide documents and resources



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**Missed Opportunities Preparing for a Call**

- Failure to:
  - Conduct their pre-call research; relying solely on "experience"
  - Get the right people to attend the meeting
  - Set an agenda and align expectations
  - Confirm the meeting and provide documents and resources
- Meeting without purpose:
  - Not knowing the outcome or leaving time for next steps



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**Missed Opportunities Preparing for a Call**

- Failure to:
  - Conduct their pre-call research; relying solely on "experience"
  - Get the right people to attend the meeting
  - Set an agenda and align expectations
  - Confirm the meeting and provide documents and resources
- Meeting without purpose:
  - Not knowing the outcome or leaving time for next steps
- Having technical challenges



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Preparing a **basic pre-call checklist** for every meeting will ensure your sales team avoids these common pitfalls.



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### Essential Information

- Organization information
- Contact information
- Solution engagement
- Connections
- Product recommendations



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### Important Questions to Ask Yourself and Your Sales Team

**WHO:** Who is participating?



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**Important Questions to Ask Yourself and Your Sales Team**

**WHO:** Who is participating?  
**WHY:** Why are they engaging?



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**Important Questions to Ask Yourself and Your Sales Team**

**WHO:** Who is participating?  
**WHY:** Why are they engaging?  
**WHAT:** What are both sides hoping to accomplish during the session?



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**Important Questions to Ask Yourself and Your Sales Team**

**WHO:** Who is participating?  
**WHY:** Why are they engaging?  
**WHAT:** What are both sides hoping to accomplish during the session?  
**WHEN, HOW, AND WHERE:** Did you confirm the meeting and test the tech? Are you prepared to share your screen, engage in conversations, and collaborate on documents?



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Familiarize your team with the **most common objections** you deal with during your general sales efforts and **prepare compelling responses** for your upcoming call.



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Download the Sandler pre-call planning template to help get you started.



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## How to Run a Hybrid Sales Discovery Process



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### Making the First 5 Minutes Count

1. Establish "Equal Business Stature" and a collaborative relationship.
2. Connect with relevance and credibility.
3. Set the expectations and desired outcomes.



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### Making the First 5 Minutes Count

1. Establish "Equal Business Stature" and a collaborative relationship.



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### There is a big difference between a vendor and an advisor.

Vendor	Advisor
<ul style="list-style-type: none"><li>✓ Gouged for price</li></ul>	<ul style="list-style-type: none"><li>✓ Value-based sellers</li></ul>
<ul style="list-style-type: none"><li>✓ Used for consulting</li></ul>	<ul style="list-style-type: none"><li>✓ Understands the problem &amp; solution</li></ul>
<ul style="list-style-type: none"><li>✓ Easily discarded</li></ul>	<ul style="list-style-type: none"><li>✓ Hard to replace</li></ul>
<ul style="list-style-type: none"><li>✓ Can be strung along</li></ul>	<ul style="list-style-type: none"><li>✓ Gets honest answers</li></ul>



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**Making the First 5 Minutes Count**

1. Establish "Equal Business Stature" and a collaborative relationship
2. **Connect with relevance and credibility.**



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**Making the First 5 Minutes Count**

1. Establish "Equal Business Stature" and a collaborative relationship
2. Connect with relevance and credibility
3. **Set the expectations and desired outcomes.**



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**Possible Credibility Statements and Questions**

- I just worked with a client in a similar situation. They were experiencing \_\_\_\_\_. Is that what is happening here?
- I noticed that your company is \_\_\_\_\_. Is that an important initiative for you?
- I know the industry has \_\_\_\_\_ recently. How are you handling that?



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**Sandler Up-Front Contract**

1. The purpose



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**Sandler Up-Front Contract**

1. The purpose
2. The date, location, technology, and amount of time available



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**Sandler Up-Front Contract**

1. The purpose
2. The date, location, technology, and amount of time available
3. The buyer's agenda



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**Sandler Up-Front Contract**

1. The purpose
2. The date, location, technology, and amount of time available
3. The buyer's agenda
4. Your agenda



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**Sandler Up-Front Contract**

1. The purpose
2. The date, location, technology, and amount of time available
3. The buyer's agenda
4. Your agenda
5. The expected outcome



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When you eliminate unfulfilled expectations and misunderstandings from the selling process, what's left?

**A great sales call.**



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## Powerful Presentation Skills



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### The Benefits of Hybrid Presentations

- Saving time and money
- Connecting with more participants
- Better interactions with multiple stakeholders
- Encouraging participation in polls or smaller group discussions
- Collaborating on documents or proposals
- Recording the meeting



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### Meet Face-to-Face or Online?

- Share screens or live demonstration
- Time, length, and location
- Get the right people there
- Room size, setup, and equipment



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### Meet Face-to-Face or Online?

- Everyone can participate
- Facilitate the best discussion
- Dress code, security, other logistics
- Make the meeting interactive



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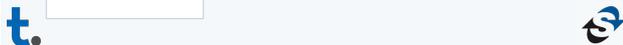
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### Meeting Format Options

Face-to-Face

100%  
face-to-face  
participation



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### Meeting Format Options

Face-to-Face	Remote
100% face-to-face participation	100% remote participation



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### Meeting Format Options

Face-to-Face	Remote	Mixed
100% face-to-face participation	100% remote participation	In-person & remote participation



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### Effective Hybrid Meeting Best Practices

- Welcome all participants.



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### Effective Hybrid Meeting Best Practices

- Welcome all participants.
- Ask for active participation.



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**Effective Hybrid Meeting Best Practices**

- Welcome all participants.
- Ask for active participation.
- Establish the agenda.



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**Effective Hybrid Meeting Best Practices**

- Welcome all participants.
- Ask for active participation.
- Establish the agenda.
- Leave time at the end.



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**Effective Hybrid Meeting Best Practices**

- Welcome all participants.
- Ask for active participation.
- Establish the agenda.
- Leave time at the end.
- Keep product demos concise.



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**Effective Hybrid Meeting Best Practices**

- Welcome all participants.
- Ask for active participation.
- Establish the agenda.
- Leave time at the end.
- Keep product demos concise.
- Customize and personalize your presentations.



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**Effective Hybrid Meeting Best Practices**

- Welcome all participants.
- Ask for active participation.
- Establish the agenda.
- Leave time at the end.
- Keep product demos concise.
- Customize and personalize your presentations.
- Practice active listening.



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**Effective Hybrid Meeting Best Practices**

- Welcome all participants.
- Ask for active participation.
- Establish the agenda.
- Leave time at the end.
- Keep product demos concise.
- Customize and personalize your presentations.
- Practice active listening.
- Capture non-essential information to address offline.



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**Advanced Tips for Hybrid Presentations**

1. Go in and out of screen share.



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**Advanced Tips for Hybrid Presentations**

1. Go in and out of screen share.
2. The floating deck



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**Advanced Tips for Hybrid Presentations**

1. Screen share
2. The floating deck
3. Whiteboarding and collaboration



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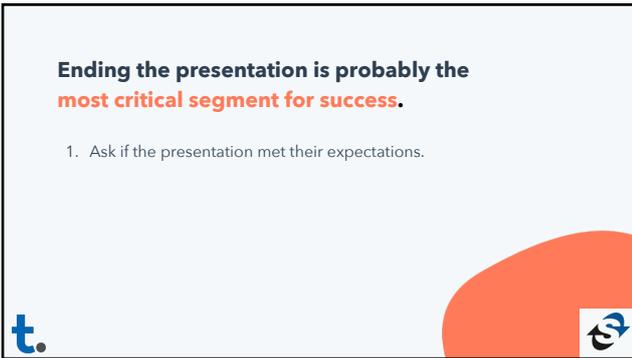
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**Ending the presentation is probably the most critical segment for success.**

1. Ask if the presentation met their expectations.



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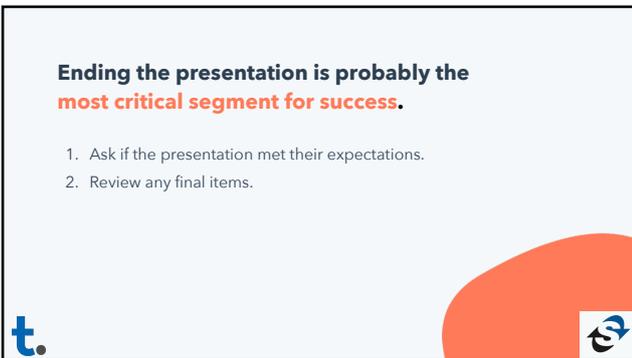
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**Ending the presentation is probably the most critical segment for success.**

1. Ask if the presentation met their expectations.
2. Review any final items.



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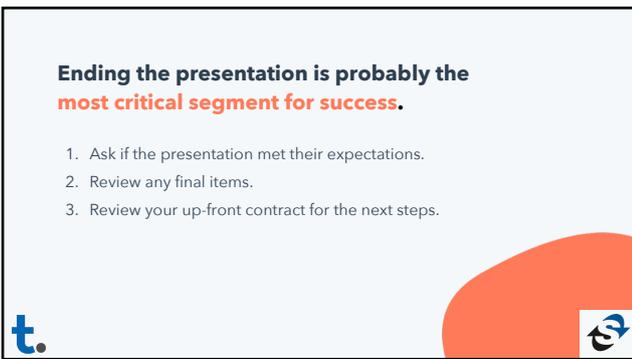
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**Ending the presentation is probably the most critical segment for success.**

1. Ask if the presentation met their expectations.
2. Review any final items.
3. Review your up-front contract for the next steps.



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**Ending the presentation is probably the most critical segment for success.**

1. Ask if the presentation met their expectations.
2. Review any final items.
3. Review your up-front contract for the next steps.
4. Finalize the decisions and action items.



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**Best Practices  
Debrief and Follow Up  
Communication Plan**



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The hybrid sales process **allows sales leaders** to do virtual ride-alongs, listen to recordings, and leverage call analytics to **improve performance in a more tangible way.**



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**Sample Questions for a Sales Debriefing Call**

- How effectively did the salesperson set an up-front contract with the prospect?
- How thoroughly did the salesperson identify the prospect's needs and budget?
- Did the salesperson end the sales call with a clear understanding of what would happen next?



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**Gather Tactical Information**

- Budget, Authority, Need & Timing
- Goals, Plans, Challenges
- Product or service level required to fulfill the sale
- Gross volume of the sale or revenue recognized
- Project scope expansion
- Specific activity and dates to come to agreement
- Specific dates to get the solution installed in the client's environment



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**Gather Tactical Information**

- Budget, Authority, Need & Timing
- Goals, Plans, Challenges
- Product or service level required to fulfill the sale
- Gross volume of the sale or revenue recognized
- Project scope expansion
- Specific activity and dates to come to agreement
- Specific dates to get the solution installed in the client's environment



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**Hybrid Sales Process Debriefing Best Practices**

1. Debrief immediately after the call.



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**Hybrid Sales Process Debriefing Best Practices**

1. Debrief immediately after the call.
2. Communicate the meeting format in advance.



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**Hybrid Sales Process Debriefing Best Practices**

1. Debrief immediately after the call.
2. Communicate the meeting format in advance.
3. Agree to "full disclosure."



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### Hybrid Sales Process Debriefing Best Practices

1. Debrief immediately after the call.
2. Communicate the meeting format in advance.
3. Agree to "full disclosure."
4. Know where the salesperson is in the sales process.



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### Hybrid Sales Process Debriefing Best Practices

1. Debrief immediately after the call.
2. Communicate the meeting format in advance.
3. Agree to "full disclosure."
4. Know where the salesperson is in the sales process.
5. Sandler categories:
  - a. What could have been done **better**?
  - b. What could be handled **differently**?
  - c. What could the salesperson do **more** of in the future?



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### Hybrid Sales Process Debriefing Best Practices

1. Debrief immediately after the call.
2. Communicate the meeting format in advance.
3. Agree to "full disclosure."
4. Know where the salesperson is in the sales process.
5. Sandler categories:
  - a. What could have been done **better**?
  - b. What could be handled **differently**?
  - c. What could the salesperson do **more** of in the future?
6. Ask, "What happens next?"



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### Hybrid Sales Process Debriefing Best Practices

1. Debrief immediately after the call.
2. Communicate the meeting format in advance.
3. Agree to "full disclosure."
4. Know where the salesperson is in the sales process.
5. Sandler categories:
  - a. What could have been done **better**?
  - b. What could be handled **differently**?
  - c. What could the salesperson do **more** of in the future?
6. Ask "What happens next?"
7. Confirm the follow-up communication and action items needed.



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### Get Answers to These Questions

1. What are the defined next steps to come to a decision?
2. What is the process to make the actual purchase?
3. Whose budget will this come out of?
4. What is the process to implement the solution?
5. When do you want to be at full capacity with the solution?
6. What are potential curveballs in both the purchasing and implementation process?
7. How can we make you look good?



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*Thankyou*  
*Questions*



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