



PETRA PROCESS

WHAT YOUR SALES PROCESS SAYS
ABOUT YOUR BRAND



WHAT YOUR SALES PROCESS SAYS ABOUT YOUR BRAND

LIFE LESSONS for BUSINESS OWNERS

The perception of your company's brand is critical to the perceived value of your product and service.

Most people think of the brand as just the company logo, but it's much more than that. Your "brand" is the sum total of the experiences, perceptions and emotions people associate with your product or service.

And, many times, the first experience that a person has with your brand is during the sales process.

Recently I experienced the epitome of a well-thought-out sales process that reflected both the real and perceived value of the company's service. The company is Priority VA, a provider of virtual assistants (VAs) for entrepreneurs and business leaders.

From the moment I was introduced via email to the owner, Trivia Barber, the sales process added value to the company's brand.

A PERSONALIZED PROCESS

The journey started with a prompt and personal reply from Trivia telling me she was excited to hear from me. The email included a link to a short survey to identify my needs and a calendar so I could select a time for a follow-up call. After a day, I received another email from Trivia's assistant asking if I had any questions or concerns. (She noticed that I hadn't completed the survey yet.)

The short survey included several provocative questions about what I was looking for in a VA. I later learned — when I talked to Trivia about her process — that they use this first step to set initial expectations with prospects and to filter out "tire kickers." They have a specific profile of the ideal customer and use the survey to filter out those who don't fit.

A few hours after completing the survey, I received a personalized email from Trivia saying that she was looking forward to our call — which I appreciated being able to schedule on my terms — and she would review all of the survey answers to make the call efficient. The day before our call, I received an email with a reminder of the appointment and the call-in directions.

MEETING THE CLIENT'S NEEDS

Next was my video call with Trivinia, where she addressed the needs I had highlighted in the survey and how they could help. It was like she knew exactly what I wanted — because she did.

At the end of the call, she followed up right away with a proposal. I also received a video explaining the next steps of the process. Once I signed the online electronic agreement and provided my credit card information, the on-boarding process began.

Within a few weeks, I was introduced to Chelsea, my new VA. The on-boarding process continued with a series of emails and videos with tips and suggestions about how to make the relationship with my new VA work most effectively.

The entire process was seamless and made the Priority VA service valuable from day one. I was inspired to contact Trivinia to learn more about how they created it. Here are five key lessons I learned from our conversation:

1. MAP EVERY STEP OF YOUR MARKETING, SALES AND ON-BOARDING PROCESS

In order to create the process for Priority VA, Trivinia and her team wallpapered a conference room with Post-It notes, detailing the sales and on-boarding process they wanted. Starting with the end in mind (a best-in-class customer experience) made it easier to select the right tools and assign responsibilities.

2. USE A PLATFORM THAT CAN GROW WITH YOUR BUSINESS

Early in the formation of Priority VA, Trivinia made the decision to invest in the InfusionSoft platform. While the initial investment and training was expensive for a startup firm, she knew that the platform could grow with her company and provide the automation to scale.

I learned that many of the emails that I thought were personalized were really tailored based on a set of forms and decision-trees in the InfusionSoft platform, which was efficient for their business and effective in making me feel like their only customer.

3. SCREEN YOUR PROSPECTS EARLY FOR THE RIGHT FIT

The initial steps of Priority VA's process are designed to screen prospects for the ideal fit. One of my favorite questions on the initial survey was, "How do you describe world-class service?" By analyzing the prospect's response, Priority VA could quickly determine if their expectations for service were too high (or low) for what they provide.

4. EDUCATE YOUR PROSPECTS AND CLIENTS

During the initial sales process and during the on-boarding process, Priority VA uses a large library of emails, articles and videos to educate their prospects and clients on how to use their service.

One example that adds to the value of their service came from Priority VA's discovery that many people hire a VA because they need help with time management. As a result, the initial messages to new clients include tailored content on how you can be more effective at personal time management.

5. DON'T SELL

This last idea really surprised me, but then it hit me: Because their sales experience is so well thought out, I never felt like I was being sold. Trivinia said, "I hate sales. My approach is simply to see if we're a fit for the prospect. Do they need what we provide? And, will they receive value from our services?"

After several months, I'm very happy with Chelsea as my VA — and I now realize I waited too long to hire one. I also know that going through the Priority VA process was instrumental in my making the decision to hire a VA.

So, take a cue from Trivinia at Priority VA and invest the time necessary to thoroughly map out your sales and on-boarding process. It's a best practice that your customers might not notice when it's in place, but they will certainly notice if it's not.

This article was originally published in The Business Journals.



THE PETRA EXPERIENCE

The Petra Experience is like a Mental Marathon of focused effort to create a specific set of priorities and a planned process to achieve them... as a team.

Looking to change your business life - forever?

The daily grind of growing a business is tough... it doesn't have to be that way. We work from our own business experiences while focusing on your business – as coach and an accountability partner. We implement the Petra Process in a way that ensures it “sticks” then we stay engaged to keep you on your path to success and less frustration. We don't want this to be just another thing you start – then it gets ignored and finally dies... let's stop that cycle in your business. The Petra Program 'clarifies' what is most important to be done – by whom, by when – **AND** creates an accountability structure to ensure **IT GETS DONE.**

*Rob Simons is an entrepreneur coach with business coaching firm Petra.
Visit his blog at www.petracoach.com for more business and leadership insight.*

PETRA COACH

342 Cool Springs Blvd., Suite 203, Franklin, TN 37067 | 888.330.1020
www.petracoach.com | www.facebook.com/petracoach

