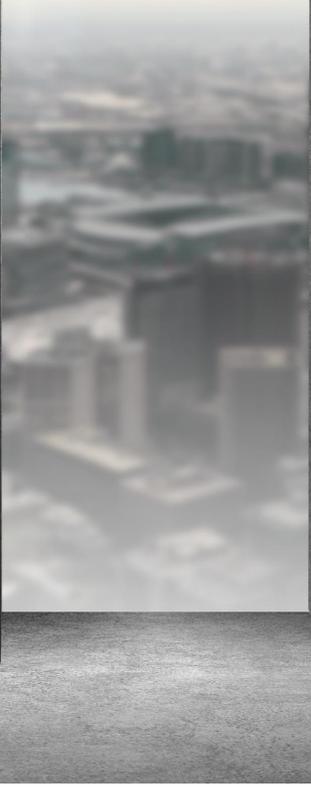




# REMOTE RELATIONSHIP DEVELOPMENT

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VIRTUAL SALES AND  
LEADERSHIP CONVERSATIONS



# OVERVIEW

The historic novel *Brave New World*, by British author Aldous Huxley, was published in 1931. Largely set in a futuristic state, it has been ranked as one of the top 100 novels of all time. This decade of the 20s is our new world. Up is down, right is left and considerable elements of our very existence are off center. The phrase next normal is one we will likely experience far into this decade. Despite the improved health of our nation, a recent study with 500 epidemiologists indicates they would wait one year or more meeting with someone they don't know well. And that was before the waves of new cases appeared.

Some suggest we're in the early innings of a most troubling trifecta. The economy struggles to return to pre-pandemic days and it may take years for that to happen.

The combination of record unemployment and civil strife alters our personal existence. Employers face a delicate balancing act between gathering associates together to optimize productivity with persistent health concerns.

Based on those and other factors, working remotely continues to expand far beyond the five million employees that toiled from their couch at the end of 2018. Video conferencing has replaced handshakes and hugs and bankers skilling up to maximize the effectiveness of conversations with clients, prospects and Centers of Influence is a key imperative at every organization.

That's why St. Meyer & Hubbard created **Remote Relationship Development.**



# REMOTE RELATIONSHIP DEVELOPMENT

This eight-part series outlines:

- Pre-Conversation Considerations
- Workplace Considerations
- Need Defining Conversations
- Partner Conversations
- Technical Considerations
- Ice-Breaking Conversations
- Story & Testimonial Conversations
- Sales Leadership & Coaching Conversations

Each session provides numerous practical tips and ideas around one central theme – how do virtual conversations maximize the experience buyers have? Each module also contains summary commentary and sales leader tips from Bob St. Meyer and Jack Hubbard.

Watch as often as you need. Viewers pick up new ideas every time they tune in. It's a new time, it's a next normal and whether it's remote or face to face, relationship development is inextricably tied to our brave new business conversation world.

The corresponding Resource Guide is filled with book and blog ideas and practical tips on how to prepare for, execute and follow up on virtual conversations. We've also developed coaching tools for sales leaders that help create the foundation of a Virtual Performance Culture.

# Session Descriptions

## PRE-CONVERSATION CONSIDERATIONS

- What today's B2B buyer wants
- Foundations of trust – the trust equation, and the 5Cs
- Customizing your meeting invitation
- Adding value and building mindshare when you confirm the meeting
- The agenda – to keep you both focused
- Preparing your space

## WORKPLACE CONSIDERATIONS

- Benefits to a virtual approach
- Speed and bandwidth
- Owls and larks
- Routines
- Avoiding Zoombieism
- Being video ready
- Be FOLO
- Synchronize with partner
- Customized conference room

## NEED DEFINING CONVERSATIONS

- Pre-boating – getting ready for a great conversation
- BNG – context setting questions
- Insight – what no other banker will ask
- First Call Six – strategic questions
- Turkey Feathering – you see the questions (and they don't)
- Summarize – you listened
- Note Bites – bullets to stay eye to eye

## TECHNICAL CONSIDERATIONS

- General settings best practices
- Utilizing the whiteboard feature
- Seamless switching
- Join courtesy
- Customized waiting room

## ICE-BREAKING CONVERSATIONS

- Using communication styles effectively
- Building trust and credibility
- Showing empathy
- Orienting the buyer to your system
- Frame the conversation – your agenda and theirs
- Body language, eye contact and tone
- The 1,002 rule – avoiding the Monday Night Football syndrome

## STORY & TESTIMONIAL CONVERSATIONS

- Share of Heart – the way to their wallet
- Video testimonials and written case studies
- Your story – based on what they want
- Seek commitment – next steps
- Calendar – know it, don't show it
- Conversation Recap – the uncommon follow up
- Tweeners – adding value between virtual visits

# Session Descriptions

## PARTNER CONVERSATIONS

- Sales Process – your way
- Prepare - roles and goals
- Smooth handoff
- The Conversation Model – who does what
- Who:
  - Answers questions
  - Tells a story
  - Handles pricing
  - Deals with concerns
  - Seeks commitment
- Rehearse – being seamless and coordinated
- Plan B – if technology fails (the partner is the producer)
- Private chat – be careful
- Virtual distress signal for – help with questions, partner droning on, let the buyer talk
- Follow up – the Conversation Recap
- Teamboarding – the new virtual onboarding

## SALES LEADERSHIP & COACHING CONVERSATIONS

- Keys to virtual success
- Sales Leader Routines
  - Team meetings – Pipelines and Skill Builders
  - Check-Ins – strategic and regular one-on-ones
  - Observations
  - Their role – they stay in it
  - Your role – you do the same
  - Note taking – about the banker behaviors
- Skills and Results Coaching
  - Manager reviews recording – what are they looking for
  - Banker reviews recording – what do they see and hear
  - Behavioral coaching ensues – tell, show, do
  - Action plan created
  - When does the manager observe again, let's calendar that

