

# Guide to Internet Resources

An Introduction to Sites and Tools for Client Research



# **Guide to Internet Resources**

An Introduction to Sites and Tools  
for Client Research

by

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## Introduction

The Internet has truly revolutionized how we access and retrieve information. It provides the ability to quickly and efficiently research client organizations at three levels of learning, namely:

- The client's industry
- The client's organization
- The client executive

This *Guide* will provide you with an introduction to some of the sites that you'll find useful in researching your clients. However, the number of Internet sites expands on a daily basis, so any document of this type is outdated as soon as it is produced! In addition, we'll provide you with numerous other sources that you should consider using to research your client. Many of these more traditional sources can easily be overlooked in this new era of Internet access!

That said, knowledge navigation via the Internet is the new skill that salespeople will have to master in order to effectively compete in today's new world of selling. The sites listed under the heading "Web Sites for General Research" starting on page 8 provide information on approaches to researching companies and links to numerous other sites.

Use this document to begin the research on your client. If you find errors in any of the sites listed, or find some intriguing new sites that your peers would benefit from, please share that information with us by sending an email to [bistriz@bellsouth.net](mailto:bistriz@bellsouth.net).

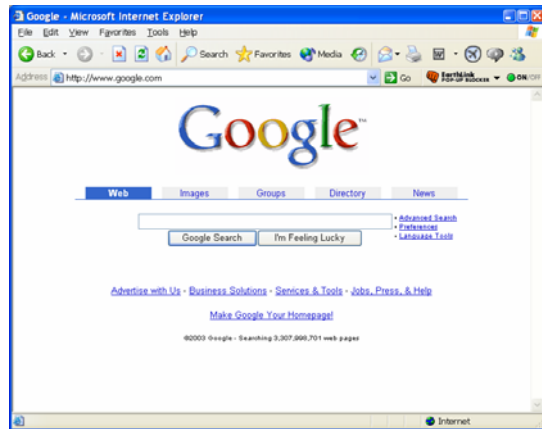
We'll use that information to update future editions of this Guide.

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## Tools of the Trade: Internet Browsers and Search Engines

Most of the resources referenced in this document are Internet-based. You are probably already familiar with at least one of the two major Internet browsers: Netscape and Internet Explorer. This document assumes a basic level of proficiency with one or both of these browsers.

A *search engine* is a program that is typically accessed as a Web site (e.g., [www.google.com](http://www.google.com)), and allows you to search for information based on key words, phrases or questions typed into a search field. Most sites offer “Advanced Search” or similarly named options that can increase the effectiveness of your searches. Power users can learn how to incorporate special “operators” into their searches to more accurately target desired information.



See [www.google.com/help/refinesearch.html](http://www.google.com/help/refinesearch.html) for an excellent guide to using operators and other advanced techniques.

There are hundreds of search engines to choose from. Here are a few of the most popular:

- **AltaVista** | [www.altavista.com](http://www.altavista.com)
- **Excite** | [www.excite.com](http://www.excite.com)
- **Go** | [www.go.com](http://www.go.com)
- **Google** | [www.google.com](http://www.google.com)
- **Hotbot** | [www.hotbot.com](http://www.hotbot.com)
- **Internet Address Finder** | [www.iaf.net](http://www.iaf.net)
- **Lycos** | [www.lycos.com](http://www.lycos.com)
- **Overture** | [www.overture.com](http://www.overture.com)
- **MetaCrawler** | [www.metacrawler.com](http://www.metacrawler.com)
- **Microsoft** | [www.msn.com](http://www.msn.com)
- **Search** | [www.search.com](http://www.search.com)
- **Webcrawler** | [www.webcrawler.com](http://www.webcrawler.com)
- **Yahoo!** | [www.yahoo.com](http://www.yahoo.com)

For hints on selecting the best search engine and how best to use a search engine, go to [www.noodletools.com](http://www.noodletools.com).

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### Three Levels of Client Learning

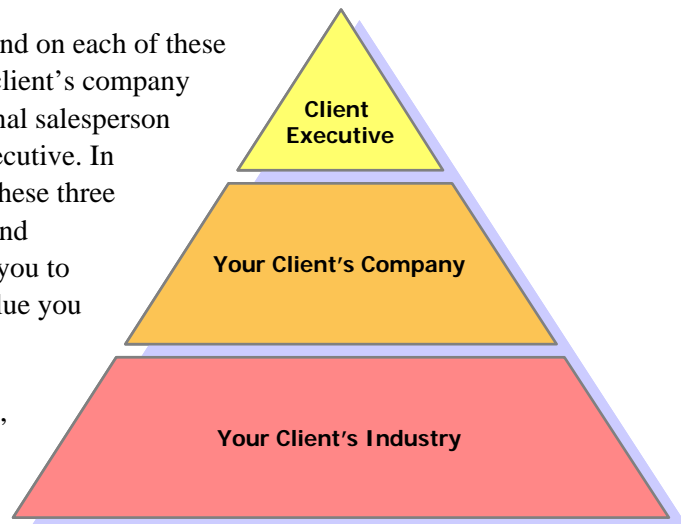
In the book, *Clients for Life: How Great Professionals Develop Breakthrough Relationships*, Jagdish Sheth and Andrew Sobel discuss the three levels of client learning and the value of that knowledge to professional salespeople.

According to the authors, developing this in-depth knowledge about a client is the fastest way to be in a position to contribute insights and create the foundation for long-term, collaborative relationships – trusted advisor relationships – with client executives.

Client learning occurs on three levels, and on each of these three levels – the client’s industry, the client’s company and the client executive – the professional salesperson increasingly adds value to the client executive. In addition, knowing about your client at these three levels helps you formulate an incisive and meaningful value proposition enabling you to clearly position and differentiate the value you bring to the client’s organization.

In today’s fast-paced sales environment, client executives expect you to have a certain level of knowledge about their company and their industry, as well as their business, prior to their first meeting with you. This level of knowledge can also be used as a way to build rapport with client executives, because you will have a clear basis on which to conduct intelligent and meaningful conversations. In addition, you will be perceived as paying the client executive the ultimate compliment; in other words, by demonstrating a keen knowledge of their business, you have shown the executive that you are willing to invest the time and resources necessary to establish a long-range relationship.

Another key point about the value of client knowledge is the fact that it actually can shorten the sales cycle because it will quickly differentiate you and your company from your competitors. Client executives know that value from a solution provider comes in several forms. It comes not only from your company’s solutions, but also from the value that you and your peers within your company bring to that executive. That’s a topic that you should make a point of exploiting with the client executive. Make certain they know and understand this critical element of your comprehensive value proposition – I can almost guarantee you that your competitors can’t offer the client this same level of value!



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## Sources of Information

There are many sources of information about your client's industry and company and some of them may be unique to your client's specific industry. Some of these might be considered traditional sources of information, while others have been developed on the Internet. You should use a variety of sources to help you conduct research about your client or prospect to see what sources are most effective in your particular sales environment. Over time, you'll determine and develop your own approach to researching new clients and prospects and doing it in a minimal amount of time.

Source	Information
<b>Company Organization Charts</b>	<ul style="list-style-type: none"><li>▪ Rank and Function of Key Executives</li><li>▪ Recent Promotions and Newest Key Players</li></ul>
<b>Company's Marketing Department</b>	<ul style="list-style-type: none"><li>▪ Profiles of Key Executives</li><li>▪ Features and Functions of Company's Products and Services</li><li>▪ Recent Speeches by Key Executives</li></ul>
<b>Company Web Sites</b>	<ul style="list-style-type: none"><li>▪ Soft Copies of Annual Reports (typically last 3–5 years)</li><li>▪ Company Directories</li><li>▪ Latest Company News</li><li>▪ Company Financials</li><li>▪ Features and Functions of Company's Products and Services</li></ul>
<b>Quarterly Earnings Call</b>	<ul style="list-style-type: none"><li>▪ Results from Previous Quarter</li><li>▪ Forecast of Future Results</li><li>▪ Questions from Analysts</li><li>▪ Note: Access company Web site for details</li></ul>
<b>Annual Reports</b>	<ul style="list-style-type: none"><li>▪ Chairman's Letter</li><li>▪ Key Financials</li><li>▪ Company Directions and Trends</li><li>▪ Company's Position in the Industry</li><li>▪ New Products and Services</li><li>▪ Executive Team</li></ul>
<b>10K</b> (Previous year's performance) <b>10Q</b> (Last quarter's performance)	<ul style="list-style-type: none"><li>▪ Profiles of Key Executives</li><li>▪ Key Financials</li><li>▪ Top Competitors</li><li>▪ Details Beyond the Annual Report</li></ul>

## Guide to Internet Resources

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### Reports from Financial Analysts

- Investment Perspectives and Outlook
  - Industry Comparisons
  - Product and Service Analysis
- 

### Company/Departmental Newsletters / Press Releases

- Latest Company Events
  - Recent Promotions
  - New Key Assignments
  - Features and Functions of Company's Latest Products and Services
- 

### Company Investor Relations Department

- Key Financials
  - Executive Team
  - Latest Company Events
  - Product and Service Offerings
- 

### Newspapers/Magazines

- Recent Articles
  - Excerpts from Key Speeches
  - Latest Industry Trends
- 

### Clipping Services\*

- Instant Updates on Articles Recently Published About Your Specific Client and The Client's Industry
  - Excerpts from Recent Speeches by Client Executives
  - News About Client Executives
- 

### Online Services and Other Internet Sites

- Free or Fee-Based
  - Profiles of Key Executives
  - Company Financials
  - Company Position Within Industry
  - Industry Trends
  - Company Outlook
  - Vast Array of Information
- 

### Industry and Association Meetings

- Company's Top Competitors
  - Company's Position Within the Industry
  - Company's Presence Versus Their Competitors
  - Industry Trends
- 

\* You should consider subscribing to clipping services that provide you with instant updates on your client and their industry. Letting your client executives know about the newest regulations in their industry, for example, represents a great way to add value to your client and they will immediately perceive that value!

**See bottom of next page for additional information on clipping services.**

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### Putting It All Together

Now that you have an idea of some of the traditional sources of information, we'll put them in perspective regarding the three levels of learning. Here are some of the sources to consider regarding each level of client learning.

Learning	Source
<b>Consolidating Information About Your Client's Industry</b>	<ul style="list-style-type: none"><li>▪ Online Services and Other Internet Sites</li><li>▪ Industry and Association Meetings</li><li>▪ Clipping Services</li><li>▪ Newspapers/Magazines</li><li>▪ Reports from Financial Analysts</li></ul>
<b>Consolidating Information About Your Client's Company</b>	<ul style="list-style-type: none"><li>▪ Company Organization Charts</li><li>▪ Company's Marketing Department</li><li>▪ Company Web Sites</li><li>▪ Quarterly Earnings Call</li><li>▪ Annual Reports / 10K / 10Q</li><li>▪ Reports from Financial Analysts</li><li>▪ Company/Departmental Newsletters / Press Releases</li><li>▪ Company Investor Relations Department</li><li>▪ Newspapers/Magazines</li><li>▪ Clipping Services</li><li>▪ Online Services and Other Internet Sites</li></ul>
<b>Consolidating Information about the Client Executive</b>	<ul style="list-style-type: none"><li>▪ Company Organization Charts</li><li>▪ Company's Marketing Department</li><li>▪ Company Web Sites</li><li>▪ Annual Reports / 10K / 10Q</li><li>▪ Company/Departmental Newsletters / Press Releases</li><li>▪ Newspapers/Magazines</li><li>▪ Clipping Services</li><li>▪ Online Services and Other Internet Sites</li></ul>

#### Additional information on clipping services:

- [www.clippingservice.com](http://www.clippingservice.com) – Search a comprehensive data base of clipping services, make comparisons and contact companies, all at no charge
- [www.burrellesluce.com](http://www.burrellesluce.com) – Fee-based clipping service that may be worth the investment

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## Web Sites for General Research

There are several web sites that are designed to help you do your business research. Each of these sites is valuable in different ways, with differing areas of focus. You should thoroughly explore each of these sites and bookmark them for quick retrieval if you find them of value.

### Industry Knowledge

Today, most clients expect sales professionals to have a certain degree of industry knowledge and expertise. You have to be conversant in your client's industry issues, pressures and trends so that you can create the most value for them.

**Business.com** | [www.business.com/](http://www.business.com/)

*"The leading business search engine and directory designed to help its users find the companies, products, services, and information they need to make the right business decisions."*

Offering *"the Internet's only business-focused search engine and directory,"* including...

- Accounting
- Advertising & Marketing
- Aerospace & Defense
- Agriculture
- Automotive
- Chemicals
- Computers & Software
- Electronics & Semiconductors
- Energy & Environment
- Financial Services
- Food & Beverage
- Government & Trade
- Healthcare
- Human Resources
- Industrial Goods & Services
- Internet & Online
- Law
- Management
- Media & Entertainment
- Pharmaceuticals & Biotechnology
- Real Estate & Construction
- Retail & Consumer Services
- Small Business
- Telecommunications
- Transportation & Logistics

**Market Research on Specific Industries** | [www.export.gov/commercialservice/](http://www.export.gov/commercialservice/)

Click on *Market Research Library* under *Quick Links* on home page.

**Fee-based Site for Industry Profiles** | [www.firstresearch.com](http://www.firstresearch.com)

Reasonably-priced in-depth industry analysis and market research on virtually every industry

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## Client Knowledge

Your ability to suggest new ideas and strategies increases dramatically as you become more knowledgeable about your client's strategy and operations. An understanding of the key players in your client's organization is also important as you build this level of knowledge.

### Researching Companies Online | [www.learnwebskills.com](http://www.learnwebskills.com)

*"This business research tutorial presents a step-by-step process for finding free company and industry information on the World Wide Web."*

This online course will enable you to:

- Locate High-Level Company Information
- Identify Telephone Numbers and Addresses
- Locate Company Home Pages
- Research Company Financial Information
- Monitor Company News and Periodicals
- Review Public Opinion
- Learn about an Industry
- Use Business and Financial Meta-sites
- Locate Professional Associations
- Find Conferences and Seminars
- Find Sales Prospects
- Research Nonprofit Organizations
- Identify International Business Resources

### Bizlink | [www.bizlink.org/default.asp](http://www.bizlink.org/default.asp)

*"The mission of the Bizlink Web site is to support the local, national, and international business communities and others conducting business research. Bizlink provides access to selected electronic and print business resources."*

Research links include...

- Company and Industry Research
- International Business
- Investment & Personal Finance
- Marketing & Demographics

## Obtaining Unique Client Knowledge

Let's assume we're looking for presentations on the latest Channel Strategy being used by Xerox and want to see if they have made that information available.

Use [www.altavista.com](http://www.altavista.com) and click on "Advanced Search."

In the section labeled: **Build a query with...**

- Key in "Xerox" in the area labeled "this exact phrase" and "Channel Strategy" in the area labeled "all of these words."
- Scroll down and change the beginning date to January 2004 and select Power Point (\*.PPT) as the file type in the drop-down menu.
- Click on FIND

You should then be able to obtain a more detailed presentation on Xerox's channel strategy than you could get from the Xerox web site.

Note: Google and other search engines have similar capabilities.

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## Information About Client Executives

This may be the most important area to research. There are several ways to obtain that information. Here's an example:

### Researching Information on a Company's CEO

- Launch the Google search engine ([www.google.com](http://www.google.com))
- In the search field, key in the name of the executive you're researching. For example, to obtain information about the current CEO of IBM, key "Sam Palmisano" into the search field.

## Other Sources

- **CEO/CXO Level Executives** | [www.CEOgo.com](http://www.CEOgo.com)  
Information on CXO-level executives
- **CEO Express** | [www.ceoexpress.com](http://www.ceoexpress.com)  
Under Internet Search, see List of Lists for a database of ranked listings of companies, people and resources available on the Internet
- **Conference Board** | [www.conference-board.org](http://www.conference-board.org)  
Articles of interest to executives. Read what executives are reading
- **CFO-level Executives** | [www.CFO.com](http://www.CFO.com)  
Tools and resources for financial executives. Read what CFOs are reading
- **On-line Research Services** | [www.CEOgoexpress.com](http://www.CEOgoexpress.com)  
Provides links to a multitude of on-line research services and firms
- **Information about CIO Executives** | [www.CIO.com](http://www.CIO.com), [www.cioexecutiveboard.com](http://www.cioexecutiveboard.com)

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## Other Online Information Services

The sites listed below contain a variety of information from all three perspectives of client learning; namely, industry, company and company executive. Some of the sites are free, partially free or fee-based. Check each site for their specific arrangements.

- **Hoovers** | [www.hoovers.com](http://www.hoovers.com)

**Hoover's Online** is a site that offers comprehensive information, some free and others at a subscription fee. The free information offered, however, is quite extensive and valuable.

Go to the site and simply key in the company name you are researching.

You'll then find that you can access the following information without purchasing a subscription:

- Overview of the Company
- Top-level Financials
- Listing of Key Executives
- Overview of the Company's Industry
- Extensive Listings of Recent News Articles Published About the Company
- Recent SEC Filings (10K, 10Q, Annual Reports and the like)
- Top 3 Competitors

More detailed information is available for a subscription fee.



- **America Online (AOL)** | [www.aol.com](http://www.aol.com)
- **Brint** | [www.brint.com](http://www.brint.com)
- **Dow Jones News** | [www.dowjones.com](http://www.dowjones.com)
- **Dun & Bradstreet Express** | [www.dnb.com](http://www.dnb.com)
- **ELibrary.com** | [www.elibrary.com](http://www.elibrary.com)
- **Executive Library** | [www.executivelibrary.com](http://www.executivelibrary.com)
- **Faulkner Information Services** | [www.faulkner.com](http://www.faulkner.com)
- **Lexis-Nexis** | [www.lexis-nexis.com](http://www.lexis-nexis.com)
- **One Source Information Services** | [www.onesource.com](http://www.onesource.com)
- **Selling Power** | [www.sellingpower.com](http://www.sellingpower.com)
- **Sales & Marketing Management** | [www.salesandmarketing.com](http://www.salesandmarketing.com)

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## Business Periodicals and News Organizations

The following sites offer substantial information on company news.

- **American Journalism Review News Link** | [www.newslink.org](http://www.newslink.org)
- **Associated Press** | [www.ap.org](http://www.ap.org)
- **Business Week** | [www.businessweek.com](http://www.businessweek.com)
- **Fast Company** | [www.fastcompany.com](http://www.fastcompany.com)
- **Forbes** | [www.forbes.com](http://www.forbes.com)
- **Fortune** | [www.fortune.com](http://www.fortune.com)
- **Harvard Business Review** | [www.hbsp.harvard.edu](http://www.hbsp.harvard.edu)
- **Newsweekly of Technology Solutions** | [www.crn.com](http://www.crn.com)
- **PR Newswire** | [www.prnewswire.com](http://www.prnewswire.com)
- **Reuters News Agency** | [www.reuters.com](http://www.reuters.com)
- **The Economist** | [www.economist.com](http://www.economist.com)
- **Wall Street Journal** | [www.wsj.com](http://www.wsj.com)
- **McKinsey Quarterly** | [www.mckinseyquarterly.com](http://www.mckinseyquarterly.com)

## Other Useful Sites

- **Carol World** | [www.carolworld.com](http://www.carolworld.com)  
Access to Annual Reports for companies headquartered outside the United States
- **Evans Research** | [www.evansresearch.com](http://www.evansresearch.com)  
Information on Technology firms based in North America, including Canada.
- **Gartner** | [www.gartner.com](http://www.gartner.com)  
Business and technology research reports
- **Healthcare Industry Pathfinder** | [www.libsci.sc.edu/bob/class/clis748/studentwebguides/health.htm](http://www.libsci.sc.edu/bob/class/clis748/studentwebguides/health.htm)  
healthcare industry links
- **Canadian companies** | [www.sedar.com](http://www.sedar.com)  
Provides free access to the required filings of publicly-held Canadian companies
- **WhatIs** | <http://whatis.techtarget.com>  
A knowledge exploration and self-education tool about information technology, especially about the Internet and computers
- **Internet Public Library** | [www.ipl.org/div/news](http://www.ipl.org/div/news)  
A listing of all newspapers of the world by geographic region
- **Corporate Information** | [www.corporateinformation.com](http://www.corporateinformation.com)  
Company reports including many international companies
- **Factiva** | [www.factiva.com](http://www.factiva.com)  
Joint venture between Dow Jones and Reuters offering fee-based information, focused on Europe and Asia, containing news from thousands of newspapers and magazines
- **BizJournals.com** | [www.bizjournals.com](http://www.bizjournals.com)  
An interesting site, devoted to business information, that provides quick links to numerous US markets (by specific cities) and allows further customization by industry.
- **Business Journal.com** | [www.businessjournal.com](http://www.businessjournal.com)  
Provides access to daily news from the World News network, with highlights from each continent.
- **International Business Resource** | [www.globaledge.msu.edu](http://www.globaledge.msu.edu)  
Contains international business resource sites organized by content, industry and country

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- **Annual Reports** | [www.annualreportservice.com](http://www.annualreportservice.com)  
Claims to provide the largest FREE directory of annual reports and 10Ks available on the web
- **Financial Executives International** | [www.fei.org](http://www.fei.org)  
An organization for financial executives from around the world
- **Money Tree Survey** | [www.pwcmoneytree.com](http://www.pwcmoneytree.com)  
Provides an excellent source of information on emerging companies that receive financing and the venture capital firms that provide it.
- **US Government Agencies** | [www.govengine.com](http://www.govengine.com)  
Site provides links to federal, state and local government agencies in the United States
- **Yahoo Finance** | <http://finance.yahoo.com>  
Complete and up-to-date business and financial site
- **Balanced Scorecard Institute** | [www.balancedscorecard.org](http://www.balancedscorecard.org)  
The balanced scorecard is a *management system* that enables organizations to clarify their vision and strategy and translate them into action
- **Links to Business Models, Terms and Theories** | [www.valuebasedmanagement.net](http://www.valuebasedmanagement.net)  
This site offers concise definitions and additional links to virtually every business term, model and theory. Management methods, models and theories are also included.
- **Links to financial and investor terms** | <http://www.investorwords.com/bysubject.html>  
Provides subject glossaries that deliver an in-depth look at the terminology associated with a specific investing or financial topic

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### Supply Chain Models

An understanding of the client's business will typically be enhanced by an understanding of the essential components of the client's supply chain. Supply chain models depict the important categories of events in any company's supply chain. By analyzing the client's business through a supply chain model, you will be able to identify the key issues and concerns so that you can more effectively articulate and leverage the strengths of your solutions.

Information on supply chain models can be found on the Supply Chain Operations Reference (SCOR) web site at [www.supply-chain.org](http://www.supply-chain.org). Click on the PowerPoint presentation of the SCOR Overview found on the opening page of that site.

### Preparing for that Critical First Call on a Client Executive

Now that you've started to conduct research about your client's industry, their company and the client executive, you'll want to start to consolidate that information so that you can conduct an intelligent first conversation with a client executive.

The following activity helps you capture information that you'd typically want to have at your fingertips, prior to that first critical conversation with the client. This will enable you to be perceived by the client executive as a thought leader who's both professional and prepared.

**Activity:** Use the Internet and Other Sources to Research Your Client

Objective	Determine best practices of researching your client or prospect (for which you have a sales opportunity), using the Internet or other sources
1	Perform a variety of searches to obtain information about a key client or prospect
2	Complete the worksheets on the next two pages and identify key information about this client or prospect that might help you in the pursuit of the sales opportunity
3	Make certain you identify the Web sites or other sources you used to gather this information and record it on the worksheets for your future reference

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## Consolidating Client Information from the Internet and Other Sources

**What are the most recent trends in the client's industry?**

**What is the client's position within the industry? How do their metrics compare with that of the industry leaders?**

**What are the client's goals or mission?**

**What are the client's key business drivers and initiatives? What is their breakthrough initiative—the initiative that would yield substantial payback if implemented or cause severe consequences if ignored—and what in the client's environment is compelling them to change?**

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## Consolidating Client Information from the Internet and Other Sources

**What payback will the client achieve if they implement this initiative or what consequences will they suffer as a result of not implementing this initiative?**

**What questions will you ask the client executive on your initial call?**

**What additional key points do you want to make on your first call on the executive (to get credit for your homework)?**

**What solution(s) can you offer the client that will impact their breakthrough initiative?**



## About the Author

**Steve Bistriz** brings more than three decades of sales and sales management experience in working with a variety of companies ranging from start-ups to global leaders. He is a published author and lecturer in the fields of sales, sales

management and selling at the executive level. Steve spent more than 27 years with IBM where he managed and led the instructional design, development and implementation of numerous national training programs for sales, marketing and technical support personnel. During his tenure at IBM, he also held a number of sales and training management positions.

His articles have appeared in numerous publications circulated throughout the world. After leaving IBM, he spent nearly eight years with Target Marketing Systems, a sales training and consulting firm based in Atlanta. There he led that company's development of sales training programs which were delivered to tens of thousands of professional salespeople around the globe. He currently is president of his own sales training and consulting firm.

Steve holds a doctorate in human resource development (adult learning and training) from Vanderbilt University, which he received in 1995.

He can be reached via email at [bistriz@bellsouth.net](mailto:bistriz@bellsouth.net).

## Other Documents Available from SellXL.com

### Selling at the Executive Level – White Paper

Today, selling to senior-level client executives requires a different set of skills and strategies than does the more traditional department-level or transactional sale. These skills and strategies can be instrumental in shortening the sales cycle, closing key business opportunities, protecting your company's profit margins and in developing lasting relationships with key client executives. While these skills are often stated as the best practices of leading sales organizations, many companies fail to execute effectively on them. This white paper highlights the importance of those key skills and also provides substantial insight into their execution. It also includes an overview of how successful salespeople create, maintain and leverage relationships with CEO-level executives in client organizations.



### Fundamentals of Selling at the Executive Level

Selling at the executive level is typically a critical component of winning a sales campaign. Rarely, in a business-to-business sales campaign, can a significant deal be won without some executive-level contact in the client organization.

Here are many of the tools and techniques that are used in the one-day Selling at the Executive Level (SellXL™) workshop. They are packaged and presented in this self-directed format to help the salesperson immediately realize many of the same benefits that could be achieved from the SellXL workshop.

In this document you'll have the opportunity to complete seven activities, each with an associated worksheet, to help you formulate your thoughts and ideas on identifying, accessing and maintaining relationships with key executives in client organizations. They were all developed with a single objective in mind: to help you improve your odds of winning a sales campaign.

