

REVISED AND EXPANDED

The **NEW RULES** of **SALES** and **SERVICE**

HOW TO USE AGILE SELLING,
REAL-TIME CUSTOMER ENGAGEMENT,
BIG DATA, CONTENT, AND STORYTELLING
TO GROW YOUR BUSINESS



DAVID MEERMAN SCOTT

Wall Street Journal bestselling author of *THE NEW RULES OF MARKETING & PR*

**The NEW RULES
of SALES
and SERVICE**

Also by David Meerman Scott

The New Rules of Marketing & PR: How to Use Social Media, Online Video, Mobile Applications, Blogs, News Releases, and Viral Marketing to Reach Buyers Directly

Marketing the Moon: The Selling of the Apollo Lunar Program (with Richard Jurek)

Real-Time Marketing & PR: How to Instantly Engage Your Market, Connect with Customers, and Create Products That Grow Your Business Now

Marketing Lessons from the Grateful Dead: What Every Business Can Learn from the Most Iconic Band in History (with Brian Halligan)

Newsjacking: How to Inject Your Ideas into a Breaking News Story and Generate Tons of Media Coverage

World Wide Rave: Creating Triggers That Get Millions of People to Spread Your Ideas and Share Your Stories

Tuned In: Uncover the Extraordinary Opportunities That Lead to Business Breakthroughs (with Craig Stull and Phil Myers)

Cashing In with Content: How Innovative Marketers Use Digital Information to Turn Browsers into Buyers

Eyeball Wars: A Novel of Dot-Com Intrigue

The NEW RULES of SALES and SERVICE

**HOW TO USE AGILE SELLING,
REAL-TIME CUSTOMER ENGAGEMENT,
BIG DATA, CONTENT, AND STORYTELLING
TO GROW YOUR BUSINESS**

REVISED AND EXPANDED

DAVID MEERMAN SCOTT

WILEY

Cover image: © [istock.com/Zeffss1](https://www.istock.com/Zeffss1)

Cover design: Wiley

Copyright © 2016 by David Meerman Scott. All rights reserved.

Published by John Wiley & Sons, Inc., Hoboken, New Jersey.

Published simultaneously in Canada.

No part of this publication may be reproduced, stored in a retrieval system, or transmitted in any form or by any means, electronic, mechanical, photocopying, recording, scanning, or otherwise, except as permitted under Section 107 or 108 of the 1976 United States Copyright Act, without either the prior written permission of the Publisher, or authorization through payment of the appropriate per-copy fee to the Copyright Clearance Center, 222 Rosewood Drive, Danvers, MA 01923, (978) 750-8400, fax (978) 646-8600, or on the web at www.copyright.com. Requests to the Publisher for permission should be addressed to the Permissions Department, John Wiley & Sons, Inc., 111 River Street, Hoboken, NJ 07030, (201) 748-6011, fax (201) 748-6008, or online at www.wiley.com/go/permissions.

Limit of Liability/Disclaimer of Warranty: While the publisher and author have used their best efforts in preparing this book, they make no representations or warranties with respect to the accuracy or completeness of the contents of this book and specifically disclaim any implied warranties of merchantability or fitness for a particular purpose. No warranty may be created or extended by sales representatives or written sales materials. The advice and strategies contained herein may not be suitable for your situation. You should consult with a professional where appropriate. Neither the publisher nor the author shall be liable for damages arising herefrom.

For general information about our other products and services, please contact our Customer Care Department within the United States at (800) 762-2974, outside the United States at (317) 572-3993 or fax (317) 572-4002.

Wiley publishes in a variety of print and electronic formats and by print-on-demand. Some material included with standard print versions of this book may not be included in e-books or in print-on-demand. If this book refers to media such as a CD or DVD that is not included in the version you purchased, you may download this material at <http://booksupport.wiley.com>. For more information about Wiley products, visit www.wiley.com.

Library of Congress Cataloging-in-Publication Data:

Names: Scott, David Meerman, author.

Title: The new rules of sales and service : how to use agile selling, real-time customer engagement, big data, content, and storytelling to grow your business / David Meerman Scott.

Description: Revised Edition. | Hoboken : Wiley, 2016. | Revised edition of the author's The new rules of sales and service, 2014. | Includes index.

Identifiers: LCCN 2016012015 (print) | LCCN 2016022539 (ebook) | ISBN 9781119272427 (paperback) | ISBN 9781119272434 (epdf) | ISBN 9781119272441 (epub)

Subjects: LCSH: Selling. | Customer services. | Internet marketing. | Big data. | BISAC: BUSINESS & ECONOMICS / Sales & Selling. | BUSINESS & ECONOMICS / Marketing / General.

Classification: LCC HF5438.25 .S347 2016 (print) | LCC HF5438.25 (ebook) | DDC 658.8--dc23

LC record available at <https://lccn.loc.gov/2016012015>

Printed in the United States of America

10 9 8 7 6 5 4 3 2 1

*This book, my 10th, is dedicated
to my grandmother Dorothy Miller Jones (1905–1996).*

*When I was a child, Grandma Jones taught me that
if you want to receive letters, you've got to write letters.*

*I wish I could share with her that
the same thing is true today about
social networking and customer engagement;
you have to give to get.*

Contents

Introduction	1
<i>The Time Is NOW</i>	6
<i>Living in the Past: The Old School of Sales and Service</i>	7
<i>First Marketing and PR, Now Sales and Service</i>	8
<i>The New Rules of Marketing and PR Are Now Widely Adopted</i>	9
<i>Living Real Time and Mobile Has Changed Everything We Do</i>	10
<i>Why Sales and Service Are Experiencing a Revolutionary Transformation</i>	11
<i>Restoring the Human Touch: The Compelling Power of Authenticity</i>	12
<i>The Importance of Story</i>	13
<i>Social Media Is All about Connecting and Sharing</i>	13
<i>Content Drives Sales and Service</i>	14
<i>We're All in Sales and Service Now</i>	14
<i>Online Content That Informs, Entertains . . . and Sells Insurance</i>	15
<i>Updates to This Revised Edition</i>	17
<i>Learning from Examples: How the Successes of Others Can Provide Ideas and Options for Your Own Organization</i>	18
1 The Old World of Sales and Service	21
<i>The Old Sales Model: "Dialing for Dollars"</i>	21
<i>The Voice of Authority: When the Salesperson Was the Expert</i>	22
<i>The Salesperson Expert versus the Web-Educated Buyer</i>	24
<i>"These Sales Leads Stink!"</i>	26
<i>Tell the Truth: The Power of Authenticity</i>	26
<i>Customer Disservice: The Little Things That Drive Us Crazy</i>	29
<i>"Please Take a Moment to Complete Our Survey": All Take and No Give</i>	30
<i>"There's a Robocall on Line One. It Says It's Urgent."</i>	32
<i>Receiving an Email Address Is Not an Invitation to Spam</i>	34
<i>Adding Social Media to Old School Sales and Support Is Still Old School</i>	35
<i>The Old Rules of Sales and Service</i>	36
2 The New Rules of Sales and Service	39
<i>Setting Down the Rules</i>	39
<i>Living Up to Their Name: OPEN Communications to Customers</i>	42

<i>The Communications Revolution That Wasn't Televised</i>	47
<i>Time to Join the Revolution</i>	50
<i>An Invaluable Sales and Service Asset: Your Employees</i>	51
<i>Big Data. Rich Data.</i>	52
<i>An Underground Business Cooks Up Innovative Sales and Service to Discover a Menu for Success</i>	54
<i>Navigating Your Sales and Service Plan</i>	57
3 Your Story	59
<i>Storytelling</i>	59
<i>"Let Me Tell You a Little Bit about Me": The Story Customers Tell Themselves</i>	60
<i>Call Larry: How One Entrepreneur's Story Defines a Company</i>	61
<i>The New Model: The Salesperson as Consultant</i>	62
<i>Mastering the Art of Effective Storytelling for Any Organization</i>	66
<i>The Health Club That Tells Its Story by Exercising an Attitude</i>	68
<i>"What Happens Next?": How a Compelling Narrative Builds a Following</i>	71
<i>A Story That Sells</i>	74
4 Integrating Marketing and Sales with Buyer Personas	77
<i>Creating Magic by Adding Context to Content</i>	77
<i>The Power of Content That Provides Exactly What You Need</i>	79
<i>The Nobis Hotel Sells to David Meerman Scott</i>	80
<i>Making Stuff Up</i>	82
<i>Annoying Three out of Four Customers</i>	82
<i>Egocentric Nonsense</i>	84
<i>Buyer Personas</i>	84
<i>No Red Alfa Romeo?</i>	86
<i>Multiple Personality Order</i>	87
<i>The Buyer Persona Interview</i>	89
<i>Uncover New and Valuable Information with Buyer Persona Research</i>	91
<i>GoPro Keeps Its Buyer Personas in Focus and Sells Millions of Cameras</i>	92
<i>Close the Gap between Sales and Marketing</i>	94
<i>Becoming the Buyer Expert in Your Company</i>	97
<i>The Buyer Persona Profile</i>	98
<i>How Buyer Personas and Journey Mapping Integrate Marketing and Sales</i>	101
<i>Midnight Oil</i>	105
<i>Sales and Marketing Working Together</i>	106
<i>People Reaching People</i>	107
5 The Sales Cycle Is Now the Buying Cycle	109
<i>We're Buying. So Stop Selling.</i>	109
<i>The End of the High Pressure Zone</i>	112

<i>Mingling with Buyers at the Learning Party</i>	114
<i>Educate and Inform</i>	115
<i>The Buyers' Journey</i>	117
<i>Driving People into the Buying Process</i>	117
<i>The Collective Intelligence of a Million Mechanical Engineers Creates a Unique Marketplace . . . and More</i>	118
<i>Now Raise Your Hand (Please)</i>	119
<i>Got Square Footage?</i>	120
<i>The Merging of Sales and Content to Facilitate the Close</i>	121
<i>A Customer for Life</i>	123
<i>How the New Rules of Selling Contributed to a Math Education Program's Success</i>	124
<i>Lead Generation Calculus</i>	127
<i>Growing Business in a Shrinking Industry . . . without Leads</i>	128
<i>Please Don't Squeeze the Buyers</i>	130
<i>Can I Have Your Phone Number?</i>	131
<i>Lessons from the Grateful Dead</i>	132
<i>The Hybrid Lead Generation Model</i>	134
<i>Defining Your Business in the Marketplace</i>	135
<i>Are You Watching Your Direct Competition or Your Customers?</i>	137
<i>Learning from Outside Your Comfort Zone</i>	138
<i>Do You Even Need Salespeople?</i>	139
<i>The Product That Virtually Sells Itself</i>	140
<i>Good for You, but What about the Rest of Us?</i>	142
6 Agile, Real-Time Social Sales	145
<i>The Quickest Wins My Business</i>	145
<i>The Ideal: Agile Sales</i>	146
<i>The Decisive Advantage: Speed</i>	149
<i>Context: The Key to Unlock Every Buyer</i>	150
<i>Newsjacking to Find Buyers</i>	151
<i>Ronnie Dunn's Real-Time Disruption</i>	152
<i>The Art and Science of Newsjacking to Reach Buyers and Create Real-Time Sales Opportunities</i>	153
<i>Newsjacking: One Lawyer Considers the Legal Implications</i>	156
<i>Live Stream Your Take on the News with Periscope</i>	157
<i>Automation Runs Amok</i>	159
<i>When Real-Time Sales Put You at the Front of the Line</i>	161
<i>Who Is Selling Whom?</i>	163
<i>Agile Sales Require a Real-Time Mind-Set</i>	163
<i>Agile Sales Mean Going Off Script</i>	165
<i>Big Data Plus Real-Time Technology Drives Sales</i>	166
<i>Predictive Analytics</i>	167
<i>Social Selling and Your Customer Relationship Management</i>	172

<i>Obsessing over Sales Forecasts Does Nothing for Your Buyers</i>	176
<i>Brawn or Brains?</i>	177
<i>Buying Signals!</i>	178
7 The New Service Imperative	181
<i>Busted Dishwasher. Great Service</i>	181
<i>What Is Customer Service Anyway?</i>	183
<i>The Elements of Customer Service</i>	184
<i>Customer Service and Corporate Culture</i>	185
<i>Content Creation</i>	185
<i>Great Customer Service Drives Sales</i>	186
<i>Getting Sales and Service into Alignment</i>	186
<i>Poor Customer Service Is the Norm</i>	187
<i>Teaching Customers to Wait for a Sale</i>	189
<i>A Clear Picture of How Great Service Generates Additional Leads</i>	190
<i>A Nonprofit Changes the Rules of Charitable Reporting While</i>	
<i>Also Changing the World</i>	192
<i>"I Hope Everyone Who Works for Your Company Burns in Hell"</i>	194
<i>Great Customer Service Starts in Person</i>	196
<i>Customer Service "Wow!"</i>	197
<i>First, Educate and Inform Your Customers</i>	198
<i>Surveys: Your Opportunity to Gather Real Data</i>	199
<i>Using Customer Feedback to Grow Revenue</i>	204
<i>How to Conduct a Survey That Helps Grow Revenue</i>	206
8 Agile, Real-Time Social Service	209
<i>Embracing Change</i>	209
<i>The Real-Time Customer Engagement Mind-Set</i>	210
<i>How Boeing Used Real-Time Communications during the 787</i>	
<i>Dreamliner Crisis</i>	211
<i>Putting Your Customers First</i>	214
<i>Customer Service Using Social Media</i>	216
<i>Vodafone Egypt Proves Social Customer Service Works Worldwide</i>	218
<i>People Want to Do Business with Other People</i>	220
<i>The Value of Personal Communications</i>	221
<i>Lost in Clinical Gobbledygook</i>	223
<i>Terrible Healthcare Customer Service</i>	223
<i>Healthier Patients through Video Customer Service in Healthcare</i>	224
<i>Making Clients Feel More Connected</i>	228
<i>Making Healthcare Personal</i>	228
<i>Customers and Business Growth</i>	231
<i>Implementing Agile Customer Service</i>	232

9	The Social You	235
	<i>When the World's Attention Turns to Your Expertise</i>	236
	<i>Getting Social</i>	239
	<i>Why Social Networking Is Like Exercise</i>	240
	<i>People You Know</i>	241
	<i>You're Already Online</i>	241
	<i>The Sharing More Than Selling Rule</i>	242
	<i>Building a Fan Base One Download at a Time</i>	244
	<i>Don't Hide in the Shadows</i>	244
	<i>You Are Not a Cat</i>	247
	<i>Building a Following</i>	248
	<i>Tweeting Yourself into a Job</i>	249
	<i>Inbound Job Search</i>	251
	<i>Achieving Your Dreams</i>	252
	<i>Manage Your Fear</i>	255
	<i>What a World We Live In!</i>	256
10	Your Social Company	259
	<i>Building the Social Selling Process into a Large Organization</i>	259
	<i>Hiring for Social Success</i>	262
	<i>Sales Managers Must Adapt, Too</i>	265
	<i>Training for Social Success</i>	266
	<i>A New Kind of Company</i>	268
	<i>Your Sales and Service Ecosystem</i>	269
	<i>Your Turn</i>	271
	Acknowledgments	273
	About the Author	275
	Index	277
	Master Newsjacking: The Online Course	289
	Have David Meerman Scott Speak at Your Next Event!	291

Introduction

Are you old enough to remember when travel agents were an essential part of your life? To book a vacation you had to go to a travel agent. There was no other choice. Every town had at least one, and in the big cities travel agencies were on every corner.

First, before you set foot in the travel agency, you might do a little research about the sort of vacation you had in mind. Warm weather at a beach? Or perhaps a week of skiing? Maybe a cruise? Did you want to go somewhere exotic and far away? Or nearby within driving distance?

Doing the research was really, really difficult.

You would ask friends for recommendations, but they knew only so much. You could read a travel magazine, but with only a limited number of pages in each issue, it was hardly comprehensive. Guidebooks helped, but because of the book publication cycles, they were inevitably dated. If you wanted to compare different destinations, you needed more than one guidebook. And by definition, a book is just one person's opinion—the author's. No matter how much research you did, it was never enough to get a total picture of a potential holiday location.

Sooner or later you had to go into that travel agency, and that's when you surrendered control of the already imperfect process: You had to put yourself at the mercy of a salesperson. As she sat behind a terminal, she tossed out destination options, quoted prices for flights and rental cars, and suggested hotels. Perhaps she loaded you up with a bunch of brochures to look through.

The best travel agents were adept at matching destinations, experiences, and properties to a traveler's needs. They built a loyal following and made a good living via repeat business and word-of-mouth referrals.

But too often, agents weren't very good and just sold what was most convenient. They would steer clients to the easy sale in Florida instead of the more complicated booking at a small resort on an obscure island in the

2 The New Rules of Sales and Service

French-speaking part of the Caribbean. Worse, unscrupulous agents would sell crappy cruises simply because they earned additional commissions from low-end operators desperate to fill their ships.

The bottom line in booking a vacation 20 years ago was simple: The travel agent was in charge of the sales process because she had the information. The unfortunate traveler was limited to her recommendations and her prices.

And it wasn't just travel. This was the case for nearly every sales situation one transacted.

It's a new world now. The way we book travel today is so utterly different from being tied to agents as to be unrecognizable.

Recently my wife and I went on a 10-day expedition to Antarctica. Since I was a kid I'd dreamed of seeing giant blue-green icebergs up close and encountering penguins and whales in the most remote continent on earth.

We began our independent research on the web more than a year before our expedition.

We used Google to find the results for such phrases as "Antarctica travel," "Antarctica expedition," and "visit Antarctica." Our searches led us to about a dozen expedition outfitters, and we carefully checked out each of them via their sites. We also found personal blogs written by people who had undertaken such an expedition. These offered great information about what we needed to consider. There were independent reviews of operators and expedition ships. We found articles profiling Antarctica travel on newspaper and magazine websites. We even landed on the site of the International Association of Antarctica Tour Operators, and while it is a trade organization, we learned a lot more there.

Unlike booking travel 20 years ago, we were in charge of the buying process. We had information from experienced experts to aid us when making our decisions. We could learn from those who had gone before us on their social networks. And we could book directly with our choice of outfitter.

Now, buyers are in charge of relationships with companies they choose to do business with.

Smart companies understand this new world and build a buying process around the realities of independent research. Instead of generic information

dreamed up by an advertising agency, they tell authentic stories that interest their customers. Instead of selling, they educate through online content. Instead of ignoring those who have already made a purchase, they deliver information at precisely the moment customers need it.

As my wife and I evaluated the various expedition outfitters, we quickly narrowed our choice to several, based on the content on their websites. We explored information about the wildlife we were likely to observe such as chinstrap penguins, gentoo penguins, elephant seals, leopard seals, minke whales, and humpback whales. We viewed amazing photographs of icebergs and watched videos of birds unique to the harsh climate. We explored ways to combat seasickness during the two-day voyage from southern Argentina to the Antarctic continent. We learned about the ships and we could virtually meet the expedition leaders. And yes, we could compare pricing of the various travel options.

We were finally ready and chose to book a 10-day adventure with Quark Expeditions, a Canada-based polar travel outfitter operating a fleet of six ice-strengthened expedition ships. The information provided by Quark served to guide us from our initial research phase to the decisive moment when we felt sufficiently educated and ready to reserve our cabin.

Quark Expeditions tells a compelling story to customers contemplating an Antarctic adventure. The informative content that Quark freely provides—stories of amazing encounters with wildlife and stunning scenic vistas, about expedition staff who are leaders in their specialties and eager to help guests learn, and detailing the professional experience that ensures a safe and enjoyable trip—leads buyers like me to the point when they are ready to take the next step.

The Quark story comes from the top. Its president and CEO, Hans Lagerweij, leads their communications efforts and tweets regularly about polar travel via [@hanslagerweij](#). As part of our research process, I tweeted Lagerweij, and he got back to me quickly. Unlike most CEOs who care more about the financials than about their customers, Lagerweij is in the thick of communications and sets the tone for what his entire team delivers, from the expedition experience itself to how that experience is sold to potential travelers.

When I placed a call to Quark Expeditions, I reached Paul, a “polar travel advisor.” I knew exactly what I wanted: which expedition ship (the *Ocean Diamond*), the dates of travel, and the type of cabin. Paul didn’t need to sell me, because the online content had already done that! And here’s the

important point: Paul knew this. Unlike the sales process a decade ago, Paul's job was 95 percent done by the time he answered my call. The actual transaction was simple and was completed quickly.

Once we had booked our expedition, the online storytelling didn't stop. At this point, Paul became a content curator, digging into Quark's information library to send me what we needed to make our trip more enjoyable.

Paul sent us content on optional Antarctica activities: camping, cross-country skiing, kayaking, snowshoeing, and yes, even a polar plunge into near-freezing water! (Gotta do it, right?!) All of these options were presented to us at the right moment in the buying process (after we booked the trip but well before departure). We also received information on an optional trekking and canoeing trip in Tierra del Fuego National Park near Ushuaia, Argentina, the southernmost city in the world and the departure point for our expedition.

Later, as the date of our trip neared and as we began to plan what we needed to pack, we received a PDF checklist of essential and suggested gear. We also watched a video of Quark's merchandise coordinator, Jaymie MacAulay, answering commonly asked questions about the best clothing to pack when traveling to the polar regions. There was information on cameras, binoculars, and video equipment. We learned about sunscreen (it's bright in Antarctica in the near 24-hour December sun). Of particular importance, we got information on antiseasickness remedies for the notorious Drake Passage in the form of a post on the Quark Expeditions blog and a video on their YouTube channel, and we were given ideas about medicine to bring.

In short, through the provision of online content, Quark led us from the initial Google search through to closing a sale, and then continued the virtual relationship all the way to our expedition departure date.

The storytelling and content delivery didn't stop there.

Among the staff of our expedition were several professional photographers, including the amazing Sue Flood, a wildlife photographer, author, and filmmaker. (She was associate producer on the award-winning series *The Blue Planet*.) A personalized copy of Sue's beautiful photography book *Cold Places* now sits on our living room table. The photographers on board the *Ocean Diamond* delivered lectures during the Drake Passage crossing and were available in the evenings after we finished each day's exploration. They offered advice about how best to photograph the amazing wildlife and scenery we were experiencing. When we went out on the Zodiac (a rigid

inflatable boat), they were there as well and came with us when we landed to explore. While shooting their own photographs, the photographic experts were also available and eager to answer questions or offer advice.

During each night's expedition recap, passengers were encouraged to upload their own photographs. The best of the photos submitted by passengers as well as those from the professionals were then collected into a Quark Expeditions Photographic Journal chronicling our voyage, which each of us was given on the last day of the expedition.

This is an ingenious sales move by Quark. Once we got home, we had a collection of hundreds of photos by which to remember our journey. The stunning images were sure to spark curiosity about Quark among our envious friends (and possibly implant the idea that we might actually do it again). Other expedition outfitters don't bother to share photos, or when they do they usually sell them to their customers. Quark Expeditions sees the value of making them free.

Many of us had epic photos included in the disk that had been shot by Quark staff members, and these could be easily shared via social media. This, of course, serves as free promotion for Quark Expeditions voyages. For example, one of the several shots of me doing my polar plunge that were taken from a Zodiac near the *Ocean Diamond* was perfect to share on Facebook. Last I checked, there were 153 likes and 47 comments on this photo, the most I've ever gotten on a Facebook post. And each person who sees my photo is a potential customer for a Quark voyage in the future.

We continue to receive information from Quark Expeditions via email about its expeditions, including a trip to the North Pole on a nuclear-powered icebreaker.

These are the New Rules of Sales and Service at work. And they are completely different from booking travel a few decades ago. Sadly, many in the travel business haven't figured this out. And it's the same story in every industry.

We live in the era of a buying process controlled by consumers, not a sales situation stacked against us. The good news is this means that people who understand the new realities can make their business fantastically successful.

The Time Is NOW

Because of the biggest communications revolution in human history, your marketplace has changed. The vast majority of human beings, more than five billion of us, are connected instantly to each other via web-based and mobile communications devices. In this technology-driven life, we crave humanity. Information about products and services is available to buyers everywhere, 24/7, and for free, and anyone can generate attention by publishing valuable content. With the expense of publishing essentially free, customers have a (loud) voice through social networks and review sites.

Therefore it is time for the New Rules of Sales and Service: **Authentic storytelling** sets the tone with **content** as the link between companies and customers. **Big data** enables a more scientific approach to sales and service. **Agile selling** brings new business to your company, and **real-time engagement** keeps customers happy.

Of course, it's not just the travel market that has changed. Every business is going through transition. Consumer products, business-to-business products and services, healthcare, nonprofit organizations in search of donations, politicians eager for votes . . . everything. Buyers are now in charge. We have instant access to virtually unlimited information. Winning companies are no longer determined by the salespeople with the best closing technique. Now success belongs to organizations that tell their buyers the best stories, companies with the best content, and those whose information aligns perfectly with buyer needs.

In *The New Rules of Sales and Service*, we will look at how people buy in today's world of always-on 24/7 information and what that means for sellers and for those who service existing customers.

I'll share how authentic and effective stories are created and how those stories are aligned with the needs of the buyer. If employees are infused with a coherent and compelling story—a corporate narrative that is defined by the CEO and has a cascade effect on all staff members such as Hans Lagerweij's stewardship at Quark Expeditions—then those employees have the means and the understanding to engage their customers instantly. Once the beat is laid down by the CEO, the employees work together like a tight rock band with the notes coming from each player to make music.

We'll focus on how real-time engagement with customers by service staff and agile sales techniques rule the day, and the importance of clear and effective content that drives people to be eager to do business with you.

I will show you how you too can make the transformation from the old ways of selling and servicing clients to the new realities now defining how people buy and do business. And I'll offer many examples of success like Quark Expeditions so you can learn from those who have mastered the new approach.

Living in the Past: The Old School of Sales and Service

Quick. What do you think of when I say “sales”?

Unless they are salespeople themselves, most people tell me they think of a slick car salesman in an ill-fitting suit, spouting a line like: “What would it take to put you into this car today?”

When people think sales, they associate it with being hustled and taken advantage of. They think of dealing with a salesperson as an adversarial relationship. The very word *sales* can prompt sleazy connotations, and people become automatically defensive in order not to be taken advantage of.

If they are of a certain age, some people think of the hustling character played by Alec Baldwin in *Glengarry Glen Ross* and lines like: “Coffee is for closers.” That’s the movie adapted from David Mamet’s 1984 Pulitzer Prize– and Tony award–winning play in which sales guys fight for a Cadillac El Dorado (first prize) or a set of steak knives (second prize). Third prize is getting fired. In such a testosterone-fueled environment, the hapless customer is just a mark. *Glengarry Glen Ross* is so iconic in American sales circles that many salespeople quote from it liberally. I’ve seen clips from the movie at several companies’ sales conferences. And it’s no surprise that it powerfully reinforces the average customer’s unease with salespeople.

How about when I say “customer service”? What comes to mind?

Many people describe the experience of calling a toll-free telephone line, only to be told “Your call is important to us” and then being forced to endure a frustratingly long wait “due to higher than average call volume.” When an actual person picks up on the other end of the line, it may be difficult to understand the accent of the outsourced representative in a far-off foreign land.

Or if it is a face-to-face encounter with someone in customer support—an airline ticket counter, say—the majority of people tell me they anticipate that indifference will prevail, if not outright rudeness.

8 The New Rules of Sales and Service

But in today's always-on world of the web, these old school approaches to sales and service need not be the norm. Modern businesses recognize that buyers have access to real-time information on any product or service that interests them and are thrilled to wait until they are fully educated before finally reaching out to a sales representative at their chosen company.

Smart companies understand that people have choices of whom to do business with, and they are transforming the way they sell and service customers.

At the same time, the web is a vast supermarket of customer information and intelligence. If a buyer is wondering how to use a product or wants to know if others have experienced the same problem and can suggest a fix, an encyclopedia of firsthand knowledge is easily at hand. People tweet their frustrations with the services they use, providing a perfect opportunity for brands to engage on customers' time. Yet most organizations still force customers to use the antiquated telephone, and make them wait on hold for a representative rather than engaging them with digital tools at the precise moment the customers need help.

The best companies recognize that real-time engagement on social networks like Facebook and Twitter not only makes customers happy because their problems are instantly addressed, but also provides guidance to future customers with the same concerns via the public discussions. Such attention to customers' needs serves to brand those companies as ones that others will want to do business with.

First Marketing and PR, Now Sales and Service

Early in my career, I worked as a sales representative at a Wall Street economic consultancy. Back then the salesperson had the information and therefore the power in the relationship.

If the buyers wanted information about how the product worked, they needed to come to me. If they wanted to negotiate a discount, they had to come through me. If they wanted to speak to a customer to learn about their

experience with my company, they had to come through me. If they wanted to talk to the founder of the company, they had to come through me. I was involved from the very beginning of the relationship, and most of the leverage was with me, the sales rep.

But now, because of the wealth of information on the web, the salesperson no longer controls the relationship. Now, the buyers can check you out themselves. They can find your customers and read their blog accounts about what you do. They can reach the founders directly via Twitter and LinkedIn. Buyers actively go around salespeople until the last possible moment and then come into negotiations armed with lots and lots of information. Now it's the buyers who have the leverage.

Most sales organizations are built and run as if it were still 1989.
The sales model is broken.

The New Rules of Marketing and PR Are Now Widely Adopted

For the past decade, I've been evangelizing how marketing and public relations (PR) have changed as a result of the web.

Throughout 2005 and into 2006, I saw the patterns clearly and wrote a book that eventually became *The New Rules of Marketing & PR*, now an international bestseller in its fifth edition and available in over 25 languages from Bulgarian to Vietnamese. The book, which has sold 350,000 copies in English, is about how to use social media, online video, mobile applications, blogs, real-time media, and viral marketing to reach buyers directly. I don't say this to brag, but rather to outline how online content has transformed the way organizations reach buyers. It has made the marketing and PR functions unrecognizable from those of just a few years before.

Prior to the web, generating attention meant buying expensive advertising or convincing the media to write or broadcast about us. But now we've got a better way: generating attention by publishing information on the web so people find it while searching with Google and other search engines, and discover it when they share on social networks.

Since *The New Rules of Marketing & PR* was initially published, the biggest challenge to getting these ideas accepted has been fear. People are reluctant to change. There has been a huge disconnect between what people actually do as consumers and what they focus on as marketers and entrepreneurs.

While many companies are doing a good job generating attention via online content, a number still insist that their target market is “different.” Even though nearly everyone turns to search engines when researching products and services and consults one’s network of friends, colleagues, and family members for advice through social networks, the fearful marketers who are resistant to change still invest an inordinate amount of time and money on traditional interruption advertising. These holdouts still focus on the traditional method of pitching-based media relations. They are using the old rules to try to generate attention.

During the past several years, hundreds of people have asked me to extend the ideas I wrote about in *The New Rules of Marketing & PR* to sales and service. They’ve told me how they’ve transformed their marketing and public relations functions and now they are ready to do the same with their sales and customer service functions. In 2012 I knew I had to begin researching the ideas that are now part of this book, and I started writing the first edition in 2013, which was released in 2014, and worked on this revised edition in 2015 and 2016.

The marketing and public relations functions have started the transformation due to the advances in real-time technologies of online content and social media; now it is time for sales and service departments to understand the new realities of growing business.

Living Real Time and Mobile Has Changed Everything We Do

The two most important trends not only for marketers and PR pros but for salespeople and customer services types alike is to understand the importance of real time and the rise of mobile.

Real time means that news breaks over minutes, not days. It means that ideas percolate, and then suddenly and unpredictably go viral to a global

audience. It's when companies develop (or refine) products or services instantly, based on feedback from customers or events in the marketplace. And it's when a business sees an opportunity and is the first to act upon it. However, too many companies leave themselves fatally exposed by flying blind through this new media environment.

Real-time engagement is about reacting instantly to what's happening in the market, following up on opportunities in seconds, and inserting your company into stories being reported by mainstream media. Those skilled at long-term campaign creation frequently lack the necessary skills of instant engagement. So an understanding of real-time media is essential.

While marketing is the provision of content to many potential customers, sales and service are now about the provision of content to buyers one at a time based on their needs.

You can engage desktop-computer users when they're at their desks. Sometimes you can engage notebook users at Starbucks. But only when users go mobile can you engage all of the people in real time all of the time. That's why mobile devices are the fastest-growing and most fascinating field in real-time market engagement. We need to understand the ramifications of people being constantly plugged in and looking for information while on the go.

Slowly over nearly a decade, the importance of these ideas has caught on with marketers and public relations people. Today, tens of thousands of organizations around the world have teams who are creating content to publish on their websites, writing blogs, and creating online videos, as well as engaging in social networks like Facebook, LinkedIn, and Twitter. And many are operating in true real-time fashion and understand mobile.

In just a few short years we've gone from skepticism to deployment by many companies, nonprofits, and other outfits.

Why Sales and Service Are Experiencing a Revolutionary Transformation

Today it's up to customers when they want to engage a salesperson. If I'm interested in buying something, I go to the web, I go to Twitter or Facebook

or LinkedIn, and I ask my friends and colleagues and family members for advice. I go to a half-dozen websites and do research. When I'm finally good and ready and I've built up my body of knowledge, I reach out, typically electronically through email, and say, "Hey, I'm interested to go to the next step," and almost always the salesperson who calls me assumes I know nothing. Most organizations are still using traditional selling and service models that were developed decades ago. This needs to change, or your organization will suffer.

Just as online content is the primary driver for successful marketing and public relations, online content is quickly becoming a dominant driver for sales and service as well.

Restoring the Human Touch: The Compelling Power of Authenticity

People want to do business with other people. That's been true since the beginning of time. A hundred years ago our great-grandparents knew the people who sold them hardware or shoes or chickens. There was a personal touch. If there was good service at a fair price and maybe a kind word and a smile, they had a business relationship that lasted for many years.

However, during the past several decades huge companies have been selling identical products to millions of people via mass media advertising on television, and in the process many companies have lost the human touch. Many smaller companies adopted the mass media approach model for their own markets. Advertising agencies were hired to develop "messages." Salespeople memorized scripts. Top executives fretted about financials, but not about customers.

Now, buyers can interact with anyone who is active in social media. They can see what companies are doing. Who is engaged? Who will talk to me? Does anyone care?

We're back to a hundred years ago and the ability to converse with the person who is selling. What can you tell me about this bike? Is this wetsuit good for scuba diving too, or is it appropriate only for surfing? Which Antarctica expedition is best for me?

An authentic encounter with a representative from a company in a sales or service situation humanizes an organization after decades of sameness.

The Importance of Story

The best businesses have an organizational story that underlies everything they do. For these outfits, that story and the resulting culture it builds mean that everybody—from the CEO and the executives to the salespeople and support staff, even the person who answers the telephone—are all delivering the same information.

By story, I don't mean making up a fairy tale. No, rather the narrative should be a real and authentic account of what the organization is all about. People associated with the company should know these stories by heart and be able to convey them easily when the need arises. These might include a compelling account detailing how the company was founded. They could tell about employees who go out of their way to help customers, or could explain how the company's products are the most expensive in the market and the reasons why.

Social Media Is All about Connecting and Sharing

When I was writing the first edition of *The New Rules of Marketing & PR* way back in 2005 and 2006, I felt as if I was the only person who had identified the idea that communicating on the web was fundamentally about understanding your buyers and publishing the valuable information that informs and educates (YouTube videos, blog posts, e-books, and the like). This was a radical idea at the time the book was released in 2007, and it was not without controversy, especially from traditional advertising veterans and public relations professionals.

But then, slowly, an understanding started to build about the power of reaching existing and potential customers on the web. Soon the incredible rise of social networking services like Facebook and Twitter created an environment where millions were exposed to what many were now calling "social media." And then, starting in 2008, the revolution that is web communications went mainstream. The idea of social media entered its full-blown hype mode in recent years, as thousands of instant experts began talking about using social media for growing a business.

Alas, all too often these self-proclaimed gurus spend way too much time talking about the individual tools (such as Twitter) and not enough about the practical aspects of the tools and what they can do as part of a company's overall strategy. And when people hear about Twitter again and again in the same context as social media, no wonder they get a hangover.

So, yes, *social media* is a buzzword that I am sometimes sick of hearing myself.

It seemed to me that most so-called experts were just hyping the tools themselves. Sure Twitter is important. But what's fundamentally more important is how people need to evolve their mind-set to be successful. Creating a Facebook page or jumping onto Twitter won't transform your business. Changing your mind-set to one of understanding buyers and publishing content on the web will.

Content Drives Sales and Service

As buyers move through the sales cycle, they self-select information that will help them. Perhaps they will encounter a blog post here, a webinar there, or maybe an e-book to read on the train ride home, just as Quark Expeditions reached me when I was investigating a visit to Antarctica. Salespeople can't hoard information like they used to, because it's all available on the web. So the smart ones have transformed themselves into a sort of information broker, serving up the perfect content to each buyer at the right time.

On the service side, once someone is signed up as a customer, information delivered at the right moment makes for a happy customer who renews existing services and buys more over time. And happy customers talk up companies on social networks.

We're All in Sales and Service Now

Back in the twentieth century, organizations had sales departments and customer support departments. Most big companies still do, but with the rise of social networking and instant engagement on the web, now we're *all* in sales and service.

Think about it. If you work at a big company and you're on LinkedIn or Twitter, you can instantly engage with your network no matter what department within the company you happen to work in. If you're an accountant at a technology company and somebody you follow on Twitter

happens to mention that he or she is researching a technology like the one your company makes, bingo! You can point the person to a video on your company's YouTube channel. Even though you're not formally in the sales department, you're still driving your contacts into the buying process.

If you run a small company, then you're in sales and service. If you're a doctor or lawyer or accountant, you're in sales and service. Entrepreneurs are in sales and service, too. Everybody who lives by their wits by going independent or starting something new or running an established organization should always be selling and providing support. The good news is that it is much easier to actually handle the sales and service aspects of running a small business.

Online Content That Informs, Entertains . . . and Sells Insurance

With my friend Larry McGlynn, I went to the Nantucket Demolition Derby. It was great to watch car crashes in beautiful autumn weather.

McGlynn is president and CEO of McGlynn, Clinton & Hall Insurance Agencies and is my insurance agent. He is a funny guy, so I'm always thinking of bad insurance humor.

"Larry, there are going to be a bunch of auto policy claims from today," I say, deadpan, as I watch the cars smash into one another.

He laughs. "Yeah, this is the only time an insurance agent can enjoy a car crash."

"Hey, is my rental car covered?" I ask. "Maybe I can take a spin in the next heat!"

That got us to plotting. No, I didn't crash my rental car in the next heat. Rather, we shot a YouTube video.

McGlynn writes the *Massachusetts Family Insurance* blog, so he understands how interesting content can serve as a way to sell for his insurance business. He pulled out his iPhone and shot a few minutes of footage. When he returned home, he had it edited into a fun little video, which he released on YouTube with the title: "When does an insurance agent enjoy a car crash?"

When I speak with entrepreneurs like McGlynn, so many of them push back on content creation. “I’m just a . . . ,” they say. (Fill in any occupation—lawyer, doctor, restaurant owner, software entrepreneur, whatever.) “There’s nothing interesting about my business that I can write about or show on a video.”

Nonsense.

There’s always something interesting that offers opportunities for creative content if you keep your mind open.

Have your iPhone ready. Interview a customer. Make a short film about something interesting in your market. Create a Periscope live video stream or shoot an interesting photo and post it on Instagram.

It has never been easier to tell interesting stories to your marketplace. Creating content like the video McGlynn made is virtually free. Ideas for stories are all around you if you just take a look.

McGlynn’s publishing efforts generate sales to new customers and also provide service to existing customers, keeping them happy so they continue to do business with his company with annual renewals. Others in his organization follow his lead and will share the content he creates.

“We are all selling,” McGlynn says. “We’re selling ourselves and everyone is selling their businesses. Today people use the Internet to search for answers to their insurance questions. If I can provide those answers, then people will see me as an expert, and it may lead them to contact me for both advice and service.”

McGlynn publishes information on his blog that he knows people are searching for. Recent blog posts have examined what insurance can provide in the event of a laptop computer fire, coverage issues that occur when traveling abroad, and what “replacement cost” means in a homeowners’ insurance policy. One of my favorite blog titles is “no txt’g while drv’g!” in which he reviewed the existing laws against distracted driving, and how a violation of those laws can negatively impact any insurance defense in a civil lawsuit.

“Sales coming from my blog posts are indirect,” he says. “It’s not like I am calling them because I am trying to make a sale. I am giving them some information. I am giving them some knowledge. I am trying to give them something that makes them think about their current status, and then they can make the decision whether to contact me or not.” And contact him they do, because McGlynn tracks sales directly to his blog posts.

“One of the biggest problems that insurance agents have always had is that they rarely hear from their existing clients,” McGlynn says. In order to