

PODCAST: A 3-Step Process for Selling (Anything) Virtually

Tip: It's not over when the Zoom call ends. Learn more on this episode of *The Insightful Leader*.

TRANSCRIPT

Craig WORTMANN: The world has changed. And we all know that now and we are adjusting to the realities of the new world.

Jessica LOVE: Craig Wortmann has thought a lot about how selling products and services has been impacted by the shift to a virtual environment. Handshakes have been replaced by mouse clicks and a wave. Looking someone in the eye really means looking into a camera or a screen. Human connection has changed. But that doesn't mean it's gone. In fact, new challenges bring new opportunities.

[music]

Wortmann: Some of those changes can actually help us show up. But go beyond show up to stand out and breakthrough in every room we're in. Whether that's a virtual room or whether it's a physical room.

[music]

Love: Welcome to *The Insightful Leader*, from Northwestern University's Kellogg School of Management. And in today's podcast we'll hear from Craig Wortmann, clinical professor of innovation of entrepreneurship and founder of the Kellogg Sales Institute, as he discusses his three step process for successful selling in a virtual world. And even if you're not in a sales role, you're still probably trying to sell your ideas and expertise--so his tips are still worth a listen. Because no matter WHAT you're selling, going virtual doesn't have to be as intimidating or impersonal as you think.

Wortmann: This stuff is fun. The virtual world can be a lot of fun.

[music fade out]

Love: The global pandemic has changed how just about everything works. And selling is no exception. So back in March, as businesses quickly grappled with running remotely, Wortmann

got to work, creating a 3-step process to guide people who were making the shift to selling virtually. The first step: preparation. But before you even pick up a pen or pencil, or open up your laptop, Wortmann says, it's important to get into the right mindset. A mindset that embraces the technology.

Wortmann: How might we show up for people in a way that takes full advantage of the technology that's been afforded to us? Zoom, WebEx, Google Meet, Microsoft Teams – these are powerful technologies. And I think we all, myself included if I'm honest, we all did sort of a collective shrug six months ago and said, Wait a minute, I have to do this through a screen? But it quickly became apparent. There's some real advantages to this. I can do so much more on technology.

Love: By embracing the technology, sellers have the ability to really connect and engage with their clients in ways they haven't been able to before. You've now got online polls and chats and Q&A's at your disposal, for example. How will you use them?

Wortmann: We now have these technology assisted tools to do all this stuff. It's not hyperbole to suggest that there are some real advantages to this. So this is a mindset.

Love: And it's important to remember that having the right mindset can impact how we present ourselves too.

Wortmann: If we treat this as a slog, as something that's like, "Oh my god, I have to do another video meeting." That's going to show up in our behaviors. It's going to show up in our skills and disciplines. And that's going to damage our ability to stand out and break through.

Love: Another part of preparation, of course, involves nailing down the details of your meeting. Here, Wortmann advises building in some extra time for the technology. Just in case others haven't embraced it quite as wholeheartedly as you.

Wortmann: You've all been in plenty of zooms where seven minutes in people still can't get their camera going. We know that. It's a reality. "You've all been in plenty of zooms where seven minutes in people still can't get their camera going. We know that. It's a reality. In the virtual world, because technology is mediating our conversation, less is actually more. And so my metaphor here is, don't put 10 pounds in a two pound bag. // When you're finished with your content, take 20% out, to make room for all the vagaries that technology does throw to us. Put two pounds in a two pound bag.

[music]

Love: Now that your mind is in the right place and your content is of the perfect weight, you can move to the ever-important preparatory checklist. And Wortmann, being something of an overachiever, actually has TWO checklists to offer up.

Wortmann: Very quickly, six months ago, my team and I got about hard work putting together what we call a pre-flight checklist, and a green room checklist for everything we do online. Why? Because just as a surgeon does in an operating suite, she or he checks things off the box to make sure. Or a pilot, she or he checks things off. They do this by routine, even though they've done thousands of flights. We go through this checklist to make sure everything is just so.

Love: Your pre-flight checklist should be all the final checks of your technology. Setting up polls and hosts ahead of time, checking the mic and camera on your computer, setting up the chat window, and even making sure a conference call line is ready, just in case the video technology falls through. The other checklist Wortmann recommends is the green room checklist.

Wortmann: The metaphor of the green room is, before we walk onto a stage, before we go live on a TV show or a movie set, we check our backgrounds, we check our dress, we check how we're framed, our microphones, all that sort of stuff. How are we showing up for people? Am I looking at the screen? Or am I looking down at my keyboard? Some people have great backgrounds, some don't, some have great lighting, some don't. Some are beautifully squared in the screen, some are not. All of these sorts of things. And so preparation really counts when we can lower barriers. So the time we get to spend together, online virtually is optimized, and there are no walls. So we need to be conscious of these things in our preparation.

[music]

Love: So, preparation complete, you're now ready for step two: Delivery. And Wortmann's first piece of advice for delivery that makes an impact, is to make sure you can summon up some positive energy.

Wortmann: Delivery impact comes from first your level of energy. Wherever you find positive energy. Recall that. Before you run meetings in the virtual world. If there are high stakes meetings, revisit that in the moments before you go live. Because when the camera's on, it's showtime. And what you want to do is exhibit positive energy.

Love: And during a video shoot he did in a studio years ago, Wortmann got some pointers on how to exhibit positive energy from the two directors in charge.

Wortmann: They said, “You're trying to fill the screen this big. And so you need 10 times the energy.” And no that doesn't mean jumping around and screaming. But what it does mean is you need to find your energy, because you are being microscopically shrunk down to a screen that's this big and you have to fill that screen. And so folks, we're all wired differently. We're men, we're women, We're extroverts. We're introverts. We have different personality types. That's okay. If you can harness that energy, and bring that through the screen. Not to the screen. Through the screen. You will have such a positive impact.

Love: And if sharing energy through the screen feels a little abstract, or you're just not sure where to start, Wortmann has one very practical suggestion. Try standing up.

Wortmann: Your body speaks ten times louder than your words. And even though you can only see me from about here up, I can still use my body and I can use it very differently than when I'm sitting. And so I can channel with my body, I can use my legs to help me channel a different form of energy. So if you can, always stand. I have leg cramps at night because I stand all day. I absolutely believe in the energy that shows up through standing.

Love: Alongside energy, there is another aspect of delivery that's essential for virtual selling. Education. But in this case, Wortmann doesn't necessarily mean teaching or instructing.

Wortmann: What I mean by education is not literally, you know, I'm going to educate you on something. What I mean is – whatever you're selling, whatever you're presenting, whatever you're discussing – show don't tell.

Love: And Wortmann says you can do this throughout your meeting. For example, instead of asking for questions, throw a large question mark on the screen, physically making ROOM for questions. Or use what he calls “signposts:” periodically flash the run of show in big, bold type, and putting an oversized number to indicate the next agenda item. Signposts make your content pop by “showing” your audience where you are, and assuring them that you are on the right track.

They also keep people engaged. And with even more distractions in a virtual environment, like incoming emails, text messages, social media, and on-screen to-do lists, engagement is key. And don't forget to use stories!

Wortmann: Stories do two things that other forms of information do not do. They connect to emotion. And they create context. These are very powerful.

Love: Back in 2006, Rob Walker, a columnist at *The New York Times*, performed an informal experiment, to test the power of storytelling. Walker, bought a few random objects that held little or no value. He then hired writers to write short stories that involved each of the objects. These stories didn't make up lies about the objects or try to confuse prospective customers; instead they offered a fanciful interpretation of where the object might have been, or what it could MEAN. They were just....stories, obviously fictional stories, that gave the object some significance. Then he auctioned them off. The result? The value of the object, when accompanied with a story, rose dramatically. In fact the average increase in value of the objects was 2700%. One of those random objects was a jar of mayonnaise, which cost Walker basically nothing.

Wortmann: It sold for \$51, a three ounce jar of mayonnaise. What I have spent a lot of time in my career pursuing is how might we tell the right story at the right time for the right reasons. It is a nested set of knowledge, skill, and discipline. Be disciplined about that.

Love: Alongside knowing when to use the right story at the right time, is knowing how to use visuals. We want our potential clients to follow along and understand what we're presenting. But if our visuals are too dense or there are too many of them, we risk distracting our clients, with "cognitive busyness."

Wortmann: We destroy energy in meetings when we try to throw too much at people. Now, what does that mean? It means I have to be really prepared. I might have notes that I can cheat off of. But that's totally fine. Because what I'm giving you is the benefit of helping you connect visually. And what my colleague Dr. Steve Franconeri at Kellogg, calls "moving the abstract to concrete." If we move too much into the abstract, we lose people. They begin to get distracted. They get cognitively busy, and we start to lose the connection, the energy.

Love: So instead of showing tons of disembodied statistics, charts, and facts, it's often better to present information verbally, while showing an engaging photo or graphic.

If we're trying to reiterate the usefulness of stories, for instance, we might explain that usefulness verbally, perhaps offering the metaphor of a quiver of arrows. Think about the arrows as stories. If we have that quiver with us at all times, with arrows tailor-made for different situations, we'll be prepared to respond to almost anything. And then, while you're making your pitch, your audience would see a picture of a quiver of arrows. This could be much more successful than

flashing up a list of facts about the usefulness of stories. And If you do want to share more detailed information visually, go for it! Wortmann just advises doing so carefully.

Wortmann: Is it okay to share some visuals with data? Of course it's okay. But be very disciplined. In other words, be very, very judicious. Because as soon as you wear me down with a lot of words and a lot of charts and a lot of graphs and a lot of facts, I start to disconnect.

[music]

Love: So, congratulations! You prepared and delivered an energetic meeting full of stories and engaging visuals. But there's one last step in the process. Personal, bespoke follow through.

Wortmann: What we should be thinking is, how might we continue to impact people, even after this thing has ended? It should be custom and clear.

Love: And there are multiple ways to follow through with a potential client that is both bespoke for them, and authentic for you. It could be an email, a brief video, a small gift, or, if you're Wortmann, a hand-written thank you note.

Wortmann: I meet a lot of people. And I am lucky to meet those people. And I feel lucky to meet those people. So is this a discipline that I do every week, write thank you notes? Yes. It's also something that is authentic to me. And I also am lucky to receive many of these during the week. They make my day. It's a tactile, physical touch in a virtual world. What could be better than that?

Love: In order to keep the follow through personal, Wortmann advises always having a post-it note and pen nearby, to take notes during meetings. And remember those online chats and Q&As that virtual platforms have to offer? That can be great material to mine too! By taking quick notes, and checking the meeting logs, you can easily personalize your follow-through.

Wortmann: This really happened with a man named Seth, who was a very senior Google guy and was retiring at a young age to go do a months-long Safari in Africa. And he happened to tell me that in the same conversation that he told me that he was a huge *Star Wars* fan. So I got him a pair of socks. And of course you're not doing this with every meeting. But the follow through needs to be bespoke. But there are some very easy ways to do that. A quick video, a thank you note. A recipe, a thing of spices, whatever it might be. Every once in a while, a pair of socks. And we can do that. And folks, lest you think that this is not still true in the virtual world, I actually would double down on my argument. This is more pronounced and more of a necessity in a virtual world.

[Music]

Love: This is a lot of advice. But if you're going to take only one thing away from this presentation about how to sell in a virtual world, it is this. Aim to be memorable.

Wortmann: The goal in selling in the virtual world should be such that every client, every prospect, every person you touch in the virtual world gets to the end of their week. And Friday night they look back over their week. Full of 35 meetings or 50. And they think of yours. They think of yours. That's entirely within our grasp.

[music]

LOVE: This episode of *The Insightful Leader* was produced by Kevin Bailey, Kim Buikema, Jessica Love, Fred Schmalz, Michael Spikes, and Emily Stone. It was written and edited by Kim Buikema and sound designed and mixed by Michael Spikes.

Special thanks to Professor Craig Wortmann, and to the Kellogg Executive Education team, who hosted the webinar where Wortmann's presentation was originally recorded.

As a reminder, you can find us on iTunes, Google Play, or our website. If you like this show, please leave us a review or rating. That helps new listeners find us.

And, if you want more leadership tips from real experts, you should sign up for our free weekly email newsletter. It's packed with ideas and research from one of the world's top 5 business schools...the Kellogg School of Management at Northwestern University. To sign up, go to kell.gg/email. Or check out our webinar series, the Insightful Leader Live, at kell.gg/webinar.

We'll be back in a couple weeks with another episode of *The Insightful Leader*.