Slide 1

Everyone is in Sales

Successful Tools & Techniques for Project Leaders

Joe Perzel, PMP
December 10, 2019 – morning session

GTS
educational events
Engage. Inspire. Inform.

REUTERS/Pawel Kopczynski

joe@jperzelinc.com - 612.801.0737 www.jperzelinc.com
https://www.linkedin.com/in/jperzel

JOEPERZEL
Speaker | Presenter | Workshop Leader

11/27/2019 9:43 AM

© 2011

Slide 2

Agenda

- Background/Introduction/Goals
- The Basics of Sales
- Essential Soft Skills
- Applying it to Your World
- Situational Examples and Case Studies
- Final Thoughts

JOEPERZEL
Speaker | Presenter | Workshop Leader

2

© 2011

Slide 3

Administriva

- Cell phones on stun
- If you need to standup, step out or walk around – please do so
- Short break about halfway through
- Bathrooms are …
- Questions and sharing are encouraged, and rewarded
- Show respect – active listening and disagree with the idea not the person
- We may "park" a topic to help us stay on task
- More information in Addendum when you see an @
- Evaluations: please fill-out – all comments are welcome and appreciated
  – Content, Delivery, Examples/Exercises/Anything else
- Look for the Golden Nuggets

JOEPERZEL
Speaker | Presenter | Workshop Leader

3

© 2011

Slide 4

Goal for today

- Present my viewpoint and principals of who sales and selling is a key tool within the project, PMO and leadership world
- Reinforce the lessons with practical group and individual exercises
  ✓ By presenting content, engaging in a dialogue and supporting my points with present-day, real-world examples
  ✓ By presenting suggestions on how to improve the odds of surviving and thriving
  ✓ And offering a bit of humor along the way

SET GOALS

JOEPERZEL
Speaker | Presenter | Workshop Leader

4

© 2011

My Background

- Software development since 1979, Business Analysis and Project Management since 1982, Staff Management since 1983
- Corporate, Not-for-profit, Government, Consulting & Staffing
- Worked in HealthCare, Government, K-12, Higher-Education, Financial, Agri-business, Services, Manufacturing, Insurance, Consulting, Software, Audit/Compliance
- Sales roles other than in th estaff, project, program, portfolio world have included:
  - ✓ Direct selling in consulting industry
  - ✓ Recruiting sales in staffing and consulting industry
  - ✓ Sales and Marketing role for multiple professional associations

JOEPERZEL
Speaker | Presenter | Workshop Leader

5

© 2011

My Background

Some of the Larger, More Complex Projects

- The management of a 7 month project to create and roll out a family of business products for a healthcare company
- The management of a 2 year rewrite of a custom Sales and Marketing automation system for a global reinsurance company
- The development of a PMO office and corresponding polices, processes and artifacts for a Higher Ed organization
- The package selection, customization and deployment of all infrastructure, back-office and on-site systems for a 20-location, Fortune 500 distribution business
- The 3 year custom development project to design and create a multi-state workers compensation system that would be available for future "sale"
- The design and implementation of a data center move for a Fortune 500 company to an out of state location requiring no business hours downtime
- The Planning, RFP creation, product selection, deployment and support of a 3 year ITIL and monitoring operations system for a company requiring 99.96% uptime

JOEPERZEL
Speaker | Presenter | Workshop Leader

6

© 2011

My Background

Some of Sales Experiences

- Spent 17 years working for and owning staffing and recruiting companies
  - ✓ Was lead recruiter for 2 start-up companies that were sold to larger regional firms
  - ✓ Sold OS, Database, development languages technical training to Fortune 500 organizations
  - ✓ Was rainmaker salesman for 2 staffing firms focusing on mid-market organizations who utilized value-add services
  - ✓ Started my own staffing company and grew it from start-up to $5M in sales in 3 years
- Started sales program for PMI-MN and grew it to generating $55k of sponsorship for our conference – all with part-time, volunteer help
- Now selling my services as a consultant, trainer, workshop leader to professional associations needing quality speakers as well as organizations and enterprises looking to improve project delivery with providing their staff improved people, project management or leadership skills

JOEPERZEL
Speaker | Presenter | Workshop Leader

7

© 2011

My Background

Some of my presentations include:

- The Dark Arts of Project Management: Influence and Politics
- How to be a Chameleon: a Key to Enterprise Project Success
- Ten Simple Ways to Screw-up a Good Project
- How to Train your Dragon: a Project Sponsor Primer
- Project Stakeholders: Dealing with Sleeping Giants to Saboteurs
- Joeisms: Leadership Concepts and Other Sage Words of Advice
- Managing Change and Surviving to Talk about it
- Managing Innovation in a Project Management World
- Yes, and… Advanced Negotiations in a Project World
- Everyone is in Sales: Successful Tools & Techniques for Project Leaders
- A "Surefire" way to Ensure Schedule Performance!

This should tell you a couple of things…

- I find titles market & attract attention - which leads to project success
- I can be irreverent, sarcastic and love debates; comments/opinions appreciated
- I focus on the soft skills in project management

JOEPERZEL
Speaker | Presenter | Workshop Leader

8

© 2011

Introrductions

- Name
- Organization
- Role/Title/Duties
- Background (Industry/Applications/Years in Project Management/any experience in Sales)
- At least 1….
  – Learning Goal for today: "I wish I knew how" or "I wish I knew why"
  – What was the last sale you made or the best sale of your life?

"My most brilliant achievement was my ability to be able to persuade my wife to marry me."

➢ Winston Churchill

© 2011

Key Elements

- Presumptions
- Sales is all about…

© 2011

I presume -
Most people hate doing "sales"

- Not really sure what it means and/or how to do it
- Don't want to be "that guy" – they think *Used Car Salesman*
- Have a long way to go to be "good enough" at sales
  ✓ Terminology
  ✓ Approaches
  ✓ Negotiations

© 2011

I presume -
Everyone has been "selling" their whole life

- Anyone have kids, spouse/partner, employees, boss?
- It is a requirement for both running a PMO and being a Project Manager
  ✓ Funding
  ✓ Resources
  ✓ Help from Legal, Finance, Marketing, etc.
- If you hate the word "sales" think
  ✓ Problem solver – the person able to explain the why and/or benefit to the other person
  ✓ Influencing for good outcomes

To me, job titles don't matter. Everyone is in sales. It's the only way we stay in business. – Harvey Mackay

© 2011

I presume -

The difference in sales and selling in an Agile world vs. a Waterfall world is…

Nothing!!

JOEPERZEL
Speaker | Presenter | Workshop Leader
© 2011

Sales and Selling

pre·sump·tion (prəˈzəm(p)SH(ə)n/): an idea that is taken to be true, and often used as the basis for other ideas, although it is not known for certain.

Rarely have
I witnessed
assumptions
turn into
facts.
SONYA TECLAI - THEGOODVIBE.CO

JOEPERZEL
Speaker | Presenter | Workshop Leader
© 2011

Definitions   @

- **Inside Sales** vs. **Hunter Sales**
- **Objection**: a reason arguing against a premise, argument, or conclusion (a good thing – more later)
- **QNC** (Qualify-Negotiate-Close): a term referencing the typical sales cycle from Qualifying the "opportunity" through Negotiating details to Closing the "sale"
- **Buying Cycle:** Qualify, Negotiate, Close, Document
- **ABC:** (Always Be Closing): a term referencing that all good "salespeople" should always be working towards agreement on the "sale" at all times
- **Call to action:** A request you make of an other person where they need to act
- **Suspects** vs. **Prospects** vs. **Customer**
- **Marketing**: process of creating relationships (something you should do from "Day 1"

JOEPERZEL
Speaker | Presenter | Workshop Leader
© 2011

Sales is all about…

" PEOPLE DON'T CARE ABOUT YOUR BUSINESS. THEY CARE ABOUT THEIR PROBLEMS. BE THE SOLUTION THAT THEY'RE LOOKING FOR. "
— TORY BURCH —

JOEPERZEL
Speaker | Presenter | Workshop Leader
© 2011

Sales is all about…

SELL THE PROBLEM YOU SOLVE, NOT THE PRODUCT.

NOT THE
PROJECT
PROGRAM/PORTFOLIO
TASK/ "OPPORTUNITY"
CHANGE REQUEST

-unkown

17

© 2011

Sales and Selling

"Best way to sell something: don't sell anything. Earn the awareness, respect, and trust of those who might buy."

– Rand Fishkin, CEO and Founder, SEOmoz

18

© 2011

Sales and Selling

The Basics of Sales

19

© 2011

Sales is all about…

- The Science
  - ✓ Knowing your goal - understanding the need or problem to be solved
  - ✓ Knowing your stakeholders
  - ✓ Being prepared
  - ✓ Having the needed solution
- The Art
  - ✓ Understanding people
  - ✓ Trust and Respect
  - ✓ Handling Objections
  - ✓ Asking a question
  - ✓ Q-N-C

20

© 2011

Key Elements

- Qualifying
- Negotiating & Objections
- Closing

Sales 101

- Know how to **qualify** the deal (think validate)
  - ✓ Help me understand what you are hoping to accomplish….
  - ✓ What is your ROI this year/for this project…
  - ✓ If I/we do this….
  - ✓ If this happens....
- **Negotiate** as needed
  - ✓ Benefits
  - ✓ Delivery
  - ✓ Engagement/help
  - ✓ Price
- Go for the **close**
  - ✓ Ask for the "business" (the decision)

Sales 101 – Qualifying

- Know who your buyer(s) are
- Get them engaged
- Know enough to close the deal – research
  - ✓ What they value/don't care about
  - ✓ Do they have any pain that you can take away
  - ✓ Are they the decision-maker – if not who is (or is it a team)
- Understand their "buying cycle"
  - ✓ Too busy now to consider your "deal"
  - ✓ When is the best time to get them in a buying mood
  - ✓ When they can (or will want to) make the "deal"

Sales 101 – Qualifying

- Know how to pre-**qualify** the deal
  - ✓ What is it you are hoping to accomplish?
  - ✓ What problem are you experiencing that I can help with?
  - ✓ If I/we get Security to approve….
  - ✓ If the sponsor is ok with this exception will you….
  - ✓ I hear you need to ….
    - ❑ Meet Security targets
    - ❑ Reduce project spending
    - ❑ Deliver the project on time
    - ❑ Deliver all the features promised

Sales 101 – Qualifying

"You can't sell medicine to someone that doesn't know they are sick."
➢ Joe Perzel

- If they are unaware of an issue, problem or opportunity it is your job to educate them
  - ✓ You accomplish that by asking questions
    - ❑ If we can pull the trigger on this deal before the vendor's year-end what type of discount do you think we can negotiate?
    - ❑ We need to deploy in May – how long do you think it will take to build the training required for a global roll-out?
    - ❑ How long do you think we can debate how to organize this project, holding off on doing the work, and still meet our deadline?

JOEPERZEL
Speaker | Presenter | Workshop Leader

25

© 2011

Sales 101 – Qualifying

Exercise

- What are typical questions you can ask to qualify what Triple Constraint is most important to your Sponsor (Price, Pace or Perfection)?

- What are other typical Qualifying scenarios you encounter?

- What methods can you use to qualify your "buyer(s)" in each scenarios?

JOEPERZEL
Speaker | Presenter | Workshop Leader

26

© 2011

One Last Thought

"You don't plan out a sales conversation, you plan the initial question and the end goal – then adapt to where the other persons takes the conversation"
➢ Pat Messerich

27

© 2011
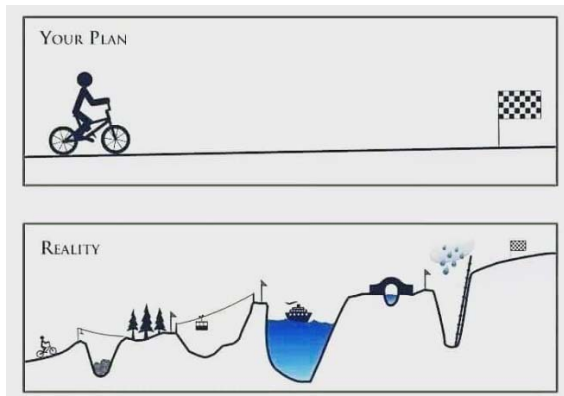
Sales 101 – Negotiations

- Negotiation is a communication process between two or more parties; in which both sides consider alternatives to arrive at a mutually agreeable solution.
  - ✓ Forging an Agreement
  - ✓ Creating a Partnership
  - ✓ An act of cooperation – NOT confrontation
  - ✓ A "Win-Win" Relationship

JOEPERZEL
Speaker | Presenter | Workshop Leader

28

© 2011

"You say it's win-win, but what if you're wrong-wrong and it all goes bad-bad?"

Great Negotiators . . . .

- Have Patience
- Understand People
- Exude Confidence
- Are Open-Minded
- Remain Calm
- Seek Options – Collaborate
- Know the Minimum Acceptable Position

Biggest Source of Mistakes

Failure to Listen is the BIGGEST Source of Mistakes in Negotiating

- Misinterpret the Other Party
- Unable to Verify what was Said
- Misunderstand a Question
- Make Improper Assumptions
- Be Unable to Respond Appropriately
- Confuse the Situation
- Slow or Halt the Progress of Negotiations
- Select the WRONG Strategies or Tactics

Joe's Negotiating Rules to Live By

- Watch, listen and learn – the first one to get an edge has the leverage
- If you're not willing to walk away you have "already bought"
- Pre-close from the start using clarifying questions – the person asking the questions has the leverage
- Remember to be quiet
- Ye who goes first usually loses
- Email, texts, IM are not for negotiating   @
- Don't sell past "Yes"!

Gaining Agreement: Techniques & Tools

- Brainstorming
- Finding common ground
- Using an agent or 3rd party
- Buying time to think
- Make proposals that are easy to agree
- Find ways to "save face" for the other side
- Work on developing partnerships

33

Objections

- They are a good sign
  - ✓ Shows interest
  - ✓ Tells you what is on their mind
  - ✓ Gives you something concrete to deal with

"Think positive, until proven otherwise"
➢ Joe Perzel

34

Objections

- You need to be prepared for them – so do your homework
  - ✓ If I was them, what concerns (objections) would I have
  - ✓ Can I overcome the objections, if so how
- You need 1 more reason they need to say yes than they have objections
  - ✓ Be creative
  - ✓ Be persistent
  - ✓ Be a partner
- Think of it as helping a customer, speaker, volunteer make a good decision

35

Sales 101 – Objections

Exercise

- How can you overcome an Objection when a resource is not available?

- What other typical objection scenarios you encounter?
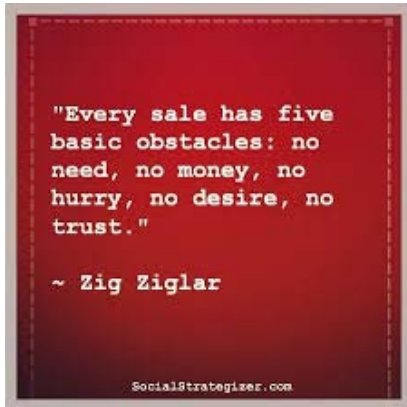
- What are methods can you use to overcome each objection?

36

One Last Thought

"Every sale has five basic obstacles:
1. **no need**
2. **no money**
3. **no hurry**
4. **no desire**
5. **no trust."**
➢ Zig Ziglar

"Every sale has five basic obstacles: no need, no money, no hurry, no desire, no trust."

~ Zig Ziglar

SocialStrategizer.com

37

© 2011

Sales 101 – Closing

• Go for the close
  ✓ Ask for the Decision
  ✓ Remind them the benefits they will achieve and what they agreed to previously
  ✓ Document the deal, thank them and run-off
  ✓ Don't sell past the Close

38

© 2011

Sales 101 – Closing

• Agreement doesn't equal consent

  ✓ Beware of phrases like:
    ❑ I think that sounds like a good idea
    ❑ That is a creative approach to solving the problem
    ❑ That's something I might be able to get behind

• Confirm and clarify (remember to ask for the close and document the agreement)

D'OH!

39

© 2011

Sales 101 – Closing

Exercise

• What is a "closing" method after you have negotiated additional project funding?

• What are other typical Closing scenarios you encounter?

• List questions to qualify your "buyer(s)" in each scenarios?

40

© 2011

Sales 101 – The Buying Cycle

- If they "buy"
  - ✓ Document the deal
  - ✓ Say thanks
  - ✓ Move on
- If they don't "buy"
  - ✓ Start the cycle over
    - ❑ Qualify
    - ❑ Negotiate
    - ❑ Close

Qualify
Document
Close
Negotiate

41

One Last Thought

Don't Sell
Past Close

42

Sales and Selling

Essential Skills

43

Key Elements

- Understanding you and your sphere of Influence
- Trust and Respect
- Ask a Question
- Influence

44

DiSC Profile Methodology @

What does DiSC stand for?

Dominance
Person places emphasis on accomplishing results, the bottom line, confidence

Influence
Person places emphasis on influencing or persuading others, openness, relationships

Steadiness
*Person places emphasis on cooperation, sincerity, dependability*

Conscientiousness
Person places emphasis on quality and accuracy, expertise, competency

Behaviors
- Sees the big picture
- Can be blunt
- Accepts challenges
- Gets straight to the point

- Shows enthusiasm
- Is optimistic
- Likes to collaborate
- Dislikes being ignored

- Doesn't like to be rushed
- Calm manner & approach
- Supportive actions
- Humility

- Enjoys independence
- Objective reasoning
- Wants the details
- Fears being wrong

45

My Profile

Dominance - *places emphasis on accomplishing results*
Influence - *Person places emphasis on influencing or persuading others*
Steadiness - *Person places emphasis on cooperation*
Conscientiousness - *Person places emphasis on quality and accuracy*

46
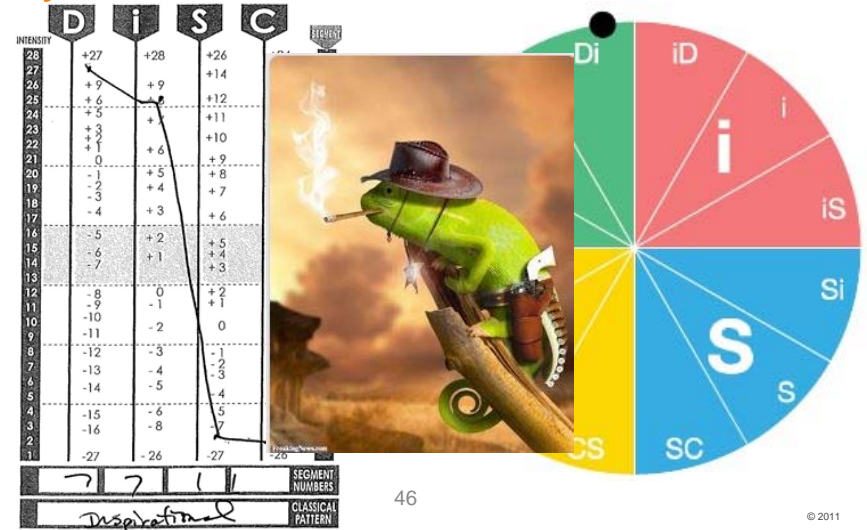
My Profile – 16 Personalities

Profiling Yourself

Exercise

• Determine what your predominate and secondary personality profile is and place the associated colors on your name tent

• Determine if you identify with any particular emoticon, avatar, animal, cartoon character or thing

48

Profiling

- Know yourself
  - ✓ Know your weaknesses/strengths
  - ✓ Hire/partner considerations
  - ✓ DI/DC – are you one of these
- Know your buyer
  - ✓ Know their weaknesses/strengths
  - ✓ How to best approach them
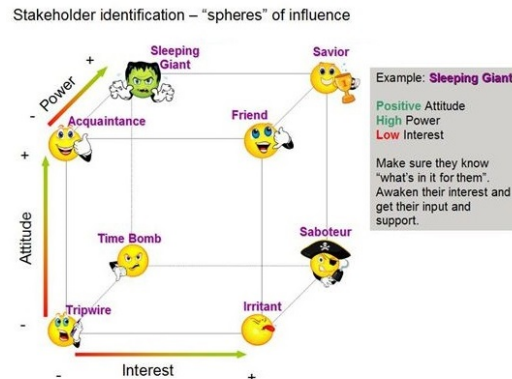 - ✓ Have you built a relationship with them yet

49

© 2011

Dominance - *places emphasis on accomplishing results*
Influence - *Person places emphasis on influencing or persuading others*
Steadiness - *Person places emphasis on cooperation*
Conscientiousness - *Person places emphasis on quality and accuracy*

Exercise: Personality Profiling

S	**I**
✓ Are good at delivering on repeatable tasks ✓ Don't like risks or change ✓ Tend to get along with everyone ✓ Stable & predictable ✓ Loyal & Good listener	✓ Like positive motivating environment ✓ Enthusiastic and optimistic ✓ Will fill the air when there is silence ✓ Want to get along with everyone ✓ Like large groups ✓ Wants to make a good 1st impression
D	**C**
✓ Want immediate results ✓ Are fast at making a decision ✓ Like challenges & will take a risk ✓ Direct and to the point ✓ Will take charge when they see (perceive) a leadership vacuum ✓ Problem solvers	✓ Wants to know more - is analytical ✓ Follows the rules ✓ Likes subtle or indirect approach to conflict ✓ Need time to absorb a point before offering an opinion ✓ Systematic

50

© 2011

Know who can impact your project

- Who are they
- Where they fall on the chart
- How to deal with each type

Note:

- Prioritize your time
- Put yourself in the "buyers" shoes

"Sales is a Contact Sport"
➤ Dean Boorman, PMP

Stakeholder identification – "spheres" of influence

Example: **Sleeping Giant**

Positive Attitude
High Power
Low Interest

Make sure they know "what's in it for them". Awaken their interest and get their input and support.

51

© 2011

One Last Thought

Pretend that every single person you meet has a sign around his or her neck that says, "Make me feel important." Not only will you succeed in sales, you will succeed in life.

-*Mary Kay Ash*

52

© 2011

Profiling Others

Exercise

- Thinking about a Sponsors on a present project you are leading and identify their dominate and secondary profile

- What techniques do you presently use to "sell" them?

- Are there any techniques you avoid when "selling" them?

© 2011

Trust and Respect

Exercise

- Why is it important to be trusted and respected when "selling"?
- What are the ways you build trust with others?
- What are the ways to hurt the trust of others or a group?

© 2011

Build Trust

- Build trust with someone or any group when you get the chance, even if they aren't in your project's sphere of influence – yet
  - ✓ Delivering on your promises
  - ✓ Talking "their" language

- Start early – before you need it
- Focus on the key Stakeholders first
- It takes time to build trust and an instant to lose it

"You cannot build a reputation on what you are going to do..."
➤ Henry Ford

© 2011

Trust Inhibitors

- Betrayed their trust in the past
- Little or no understanding of the other person or group
- Not listening and paying attention to the person or group
- Not communicating in the other person or group's "language"
- No relationship with the other party

© 2011

One Last Thought

Great relationships aren't built in a day - great relationships are built daily.

101 Quotes About.com

© 2011

Asking a Question

"It is wiser to find out then to suppose..."
➢ Mark Twain

IT IS WISER TO FIND OUT THAN TO SUPPOSE.
MARK TWAIN

© 2011

Asking a Question

- Know when to ask a question, and how to do it effectively, by asking yourself:
  - ✓ Am I trying to build rapport
  - ✓ Am I looking to gather information
  - ✓ Am I looking to lead the discussion to a particular end-point or decision

"I have no Special Talents, I am just passionately curious"
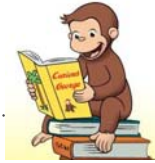➢ Albert Einstein

© 2011

Asking a Question

- Building rapport questions
  - ✓ How was your weekend/doing anything fun this weekend?
  - ✓ How is the family?
  - ✓ I see you like … biking, sailing, baseball, Crown Royal, Dilbert, plants……

  - ✓ Wasn't that a tough meeting to sit through?
  - ✓ Boy, you did a great job explaining that complicated topic – how did you do it?

© 2011

Asking a Question

- Gathering information questions

  - ✓ I haven't seen you around before, are you new to the company or department?
  - ✓ What do you do?
  - ✓ What company/department were you at before your present job?
  - ✓ Do you have any contact with this project?

  - ✓ How do you see the project going so far?
  - ✓ Do you have any thoughts on the project assumptions we just reviewed?
  - ✓ How would you address the risks we just discussed?

61

Asking a Question

- Leading the discussion questions

  - ✓ How do you see the project going so far?
  - ✓ Do you have any thoughts on the project assumptions we just reviewed?
  - ✓ How would you address the risks the assumptions generated?
  - ✓ If we did … to mitigate the risks would you help me talk to the sponsor to get their buy-in?

  - ✓ Do you think the milestones are achievable?
  - ✓ Where do you see the biggest challenge to meeting the milestones?
  - ✓ How would you handle the challenges?
  - ✓ If I did …. would you support it?

62

Asking a Question

- Be open to hearing the feedback
  - ✓ Ask questions
  - ✓ Listen
  - ✓ Put on your body armor

63

Asking a Question

- Validate anything important that may impact your project
- When speaking with someone spend more time listening then talking

The biggest communication problem is we do not listen to understand. We listen to reply.

64

One Last Thought (using Inductive Reasoning) @

1. You need to have Influence to sell someone on an idea
2. To have influence you need to have their trust and respect
3. To have influence, trust and respect you need to understand yourself and the person you are influencing
4. To understand someone to have influence, trust and respect you need to know who to engage because they may impact your project
5. Once you know who may impact your project you need to ask them questions to build respect and trust so that you can influence them as needed to be successful

➢ It's as simple as that…..

© 2011

Sales and Selling

Your World

© 2011

Remember…

- Put yourself in the "buyers" shoes
  - ✓ Know your "buyer"
  - ✓ Understand their role in the organization
- The other person cares about
  - ✓ Outcomes
  - ✓ Life after the project is complete
  - ✓ Looking good to their peers and their boss

© 2011

Know Your Facts

- Metrics
  - ✓ People most often trust metrics more then "my experience says"
  - ✓ Knowing the details helps with your confidence
- Don't get caught off-guard with the other person knowing more than you
- It really helps with the "Detailed Oriented" types
- Even with the Executive level – when they ask that "2nd question"

© 2011

Talk Their Language…..

- How would you address the following:
  - ✓ CEO/Top Dog
  - ✓ COO
  - ✓ CIO
  - ✓ PMO/Portfolio Leader
  - ✓ Business/Functional Leader
  - ✓ Sales
  - ✓ Marketing
  - ✓ Finance
  - ✓ HR
  - ✓ Subject Matter Expert (SME)

69

© 2011

Talk Their Language Example

	Sponsor, Stakeholders and Organization	PMO and IT
Project is about:	Delivering organizational benefits	Being on-time, on-budget, with requested feature - following process
Status:	Are we on track for meeting goals/delivery of the benefits?	Are we on track for meeting deadline, budget, with requested features
Risks & Issues are:	Something that impacts the project goals or prevents delivery of benefits	Something that impacts the goals, deadline, budget, requested features
Metrics they care about:	What we need to track to know if we are reaching the business goals and benefits	What we need to track to know if we are on time, on budget, with requested features

70

© 2011

The Optimum Outcome

- The best scenario is often for someone else to promote the idea or champion the cause
  - ✓ Unsolicited
  - ✓ Made it their idea
  - ✓ Higher-up the better - CEO/President/VP/Division Director
  - ✓ Respected underling

71

© 2011

The Dark Arts of Project Management

Situational Examples

72

© 2011

Slide 1 (top-left):

Buy-in
Teaching Asking
Talking Persuading Coaching
Helping Conversing Differentiating
Networking Credibility
Objections Acknowledging
Influencing Mentoring
Educating
Presence

Slide 2 (top-right):

"Presence"

Slide 3 (bottom-left):

Presentation Recap

- What are other words for Authority and Power?
- What are some of the techniques to validate?
- What are the reasons to ask a question?
- What are the 3 axis for Stakeholder Identification?
- What are some of the inhibitors to Trust?
- The biggest communication problem is that we do not ….
- Sales is all about….
- Why are Objections good?
- What is the biggest mistake made when negotiating?
- List Joe's Negotiating Rules to Live by
- Agreement doesn't equal…..?
- How many times did I suggesting asking a question during this presentation?
- When did you start your sales career?

JOE**PERZEL**
Speaker | Presenter | Workshop Leader

Slide 4 (bottom-right):

How many of theses were you aware of when they happened?

One Final Last Thought

What tools and techniques did I use to Influence the outcome I wanted today….

1. How many times did I make an effort to sell the topic and concepts?
2. Presentation title
3. Set-up/configured the meeting room
4. Used an Agenda
5. Provided my background
6. Utilized a tool (PowerPoint) to control the pace and content of the meeting
7. Provided Hand-outs - without some slides
8. Socialized before the presentation - asked people I met before presentation to help out
9. Asked for participation - in the slide deck and directly
10. Determined if an activity was Individual, Group or Team
11. Asked for background from everyone
12. Offered treats – bribes/candy
13. Asked a question
14. Encouraged asking questions
15. Called on – cornered people
16. Utilized examples to emphasize my points
17. Was quiet while waiting for responses
18. Asked to have an assistant/scribe help me – Thank you Vanna
19. Jokes, Quotes and Graphics
20. How I dressed

YODA

JOE**PERZEL**
Speaker | Presenter | Workshop Leader

Slide 77

REUTERS/Pawel Kopczynski

Questions
Evaluations &
1 Lesson Learned

JOE**PERZEL**
Speaker | Presenter | Workshop Leader

77

© 2011

Slide 78

Email Joe to offer **feedback** or request a full **copy of any presentation**

Project Management Essentials
- ✓ Project Management for the Beginner – the minimum you need to know to thrive
- ✓ The PM/BA Conundrum
- ✓ Building your Essential PM Soft skills
- ✓ Top Ten Ways to Screw-up a Good Project
- ✓ Using MS Project – the minimum you need to know to thrive

The Dark Arts of Project Management Series
- ✓ Yes, And… Advanced Negotiations in a Project World
- ✓ The Dark Arts of Project Management: Influence and Politics
- ✓ How to be a Chameleon: a Key to Enterprise Project Success
- ✓ How to Train Your Dragon: a Project Sponsor Primer
- ✓ The Art of Sales and Selling: Tools & Techniques Everyone Needs to Know
- ✓ Selling the Value of the PMO and Project Management
- ✓ A "Surefire" way to Ensure Schedule Performance!
- ✓ Leadership: The Making of a Professional, Enterprise PM
- ✓ Managing Change and Surviving to Talk about it
- ✓ Managing Innovation in a Project Management World

Case Studies
- ✓ Best Practices in Building out a Security Program
- ✓ Building out SCSU's PMO
- ✓ itSMF ITIL Deployment

JOE**PERZEL**
Speaker | Presenter | Workshop Leader

joe@jperzelinc.com - 612.801.0737
https://www.linkedin.com/in/jperzel
https://m.facebook.com/JPerzelinc-1830983350508822

© 2011

Slide 79

Sales and Selling

Addendum

joe@jperzelinc.com - 612.801.0737
https://www.linkedin.com/in/jperzel
https://m.facebook.com/JPerzelinc-1830983350508822

JOE**PERZEL**
Speaker | Presenter | Workshop Leader

79

© 2011

Slide 80

Definitions

- **ABC: (**Always Be Closing): a term referencing that all good "salespeople" should always be closing the "sale" at all times
- **QNC** (Qualify-Negotiate-Close): a term referencing the typical sales cycle from Qualifying the "opportunity" through Negotiating details to Closing the "sale"
- **ROI:** Return on Investment
- **CBA:** Cost Benefit Analysis
- **POC**: Proof of Concept
- **SME**: Subject Matter Expert
- **OBE:** Overtaken by Events: forced to be changed because of something that has suddenly and unexpectedly happened
- **SDLC:** System Development Life Cycle
- **TLA**: Three Letter Acronym, something the world has too many of these days

JOE**PERZEL**
Speaker | Presenter | Workshop Leader

80

© 2011

Definitions

- **Project:** a temporary endeavor with a defined beginning and end
- **Process:** a process is a set of activities that interact to achieve a result
- **Project Management**: the discipline of planning, organizing, motivating, and controlling resources to achieve specific goals
- **Project Manager**: the person responsible for accomplishing the stated project objectives. (on time, on budget and with everyone smiling – jp)
- **Program Management:** the application of knowledge, skills, tools, & techniques to a group of related projects
- **Portfolio Management:** the centralized management of one or more portfolios to achieve strategic objectives
- **Project Sponsor:** a person or group who provides resources and support for the project, program, or portfolio who is accountable for enabling success
- **Partner**: One associated with another especially in an action: associate or colleague - one of two or more persons who play together
- **Resource**: Everyone (or thing) that assists you with your project

81

Definitions

- **PMO**: a group within a business, agency or enterprise that defines and maintains standards for project management within the organization. The PMO strives to standardize and introduce economies of repetition in the execution of projects
  - ✓ enterprise PMO
  - ✓ organizational (departmental) PMO
  - ✓ special purpose PMO
- **Project Charter**: A statement of the scope, objectives, and participants in a project.
- **RAID**: Risk, Assumptions, Issues and Decisions
- **Triple Constraint**: Price/Pace/Perfection – cost/time/requirements or features
- **Table Stakes:** the minimum rigor required to handle the **mechanics** for a project
- **Disruptive Innovation:** causing a major change in a company and/or market place (think the first social media apps, creating the bridal registry)
- **Incremental Innovation**: causing a minor change in a company and/or market place (think converting bridal registry to all digital)

82

Definitions

- **Innovation Disrupters**: The 20% of an Organization that causes change in the Organization - You!
- **Stakeholder:** an individual, group, or organization, who may affect, be affected by, or perceive itself to be affected by a decision, activity, or outcome of a project
- **Stakeholder analysis**: systematic gathering and analyzing of qualitative data to determine whose interests should be taken into account when developing and/or implementing a project, program, policy/process update
- **Empathy**: the feeling that you understand and share another person's emotions; the ability to share someone else's feelings
- **Table Stakes:** The minimum rigor required to handle the **mechanics** for a project
- **Adapting**: to change (something) so that it functions better or is better suited for a purpose
- **Inductive vs. Deductive**: thinking styles that are Bottom-up vs. Top-down

83

Definitions

- **Waterfall Methodology:** a sequential design process in which progress flows steadily downwards through the phases of conception, initiation, analysis, design, construction, testing, implementation and maintenance
- **Phase/Activity/Task**: Various levels of a schedule/plan
- **Dependency**: Required predecessor/successor
- **Critical Path:** determined by identifying the longest stretch of dependent activities & measuring the time required to complete from start to finish
- **Slack time**: The built-in time in your project where you have excess capacity or duration
- **Crashing a Project Plan**: Optimizing the project tasks for quickest delivery
- **T-shirt sizing:** Ball-park estimating of the size of effort to accomplish something

84

Definitions

- **Agile Methodology:** Software development under which requirements and solutions evolve through the collaborative effort of self-organizing and cross-functional teams and their customers/end users
- **Wagile**: Doing a lot of short waterfalls and calling it agile
- **Agile Scrum:** iterative and incremental agile software development framework for managing product development. It defines "a flexible, holistic product development strategy where a development team works as a unit to reach a common goal", and enables teams to self-organize by encouraging close online collaboration of all team members
- **Agile Kanban:** method for managing knowledge work which balances demands for work with the available capacity for new work. Work items are visualized to give participants a view of progress and process, from task definition to customer delivery. Team members "pull" work as capacity permits, rather than work being "pushed" into the process when requested
- **User Story:** informal, natural language description of one or more features of a software system. User stories are often written from the perspective of an end user or user of a system

85

Definitions

- **Epic:** a large user story in software development and product management
- **Story points:** Effort level assigned to the work to complete a Story
- **Scrum Master:** resource who is accountable for removing impediments to the ability of the team to deliver the product goals and deliverables and acts as a buffer between the team and any distracting influences while facilitating key sessions and encouraging the team to improve
- **Product Manager:** owner of the business strategy behind a product
- **Product Owner:** represents the product's stakeholders and is responsible for delivering good business results
- **Stand-up:** a short, focused, timely meeting where all team members disseminate information – often held daily

86

Definitions

- **Project Mechanics:** The normal, day-in, day-out tasks associated with running a project
  - Setting-up a Charter, RAID, Communication plan, etc.
  - Setting-up meetings & creating agendas
  - Taking notes or meeting minutes
  - Creating project plans and updating them
  - Reporting project status
- **Joe's Definitions of the Multiple Types of Project Managers:**
  - Project Coordinator: great at mechanics of the project
  - Technical Project Lead: focuses on managing the technical team
  - Application Project Manager: handles projects under $500k and 10 people
  - Enterprise Project Manager: handles projects over $1M and 20 people

87

Definitions

- **Joe's Definitions of the Multiple Types of Project Managers**
  - Project Coordinator: great at mechanics of the project
  - Technical Project Lead: focuses on managing the technical team
  - Application Project Manager: handles projects under $500k and 10 people
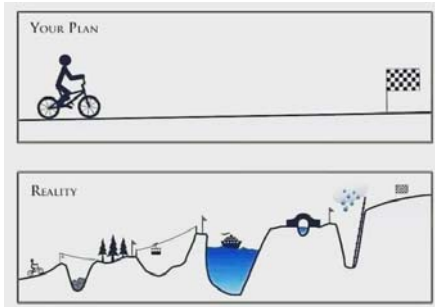 - Enterprise Project Manager: handles projects over $1M and 20 people

88

Project "Mechanics"

The normal, day-in, day-out tasks associated with running a project

- Setting-up a Charter, RAID, Communication plan, etc.
- Creating project plans and updating them
- Setting-up meetings & creating agendas
- Taking notes or meeting minutes
- Reporting project status

89

On-line Personality Tests

- **Websites for various personality profile tools:**
- https://www.discprofile.com/what-is-disc/overview/
- https://www.discinsights.com/personality-style-d#.Vr0HqFLGrcM
- https://store.gallup.com/c/en-us/assessments
- http://www.16personalities.com/
- http://www.myersbriggs.org/my-mbti-personality-type/mbti-basics/

- **Options and analysis**
- http://www.suestockdale.com/different-types-of-personality-tools/

90

Impact Analysis Worksheet

Name	Organization	Role	Power	Interest	Attitude	Risks/Unique Facts/Expectations	Ways to Manage	Label

91

Email Etiquette

- EMAILS, IM and Text are for:
  - ✓ Confirming and clarifying
  - ✓ Introductions
  - ✓ Quick transferring of information that doesn't require negotiations
  - ✓ Good News
- EMAILS, IM and Text are **NOT** for:
  - ✓ Communicating bad News
  - ✓ Negotiations or disagreement resolution or arguing or venting
  - ✓ Topics that need discussion (If a topic requires more than 3 email/Test/IM messages, pick up the phone)
  - ✓ Any communication that requires analysis of the receiver's reaction
  - ✓ Multi-faceted/threaded conversations
  - ✓ Fast Action

92

What to do…..

"Be decisive. Right or wrong, make a decision. The road of life is paved with flat squirrels who couldn't make a decision."
~Unknown~