

SOLUTION SELLING

The Mindset
The Processes
The Results

Molly Rigatti



Today We'll Cover

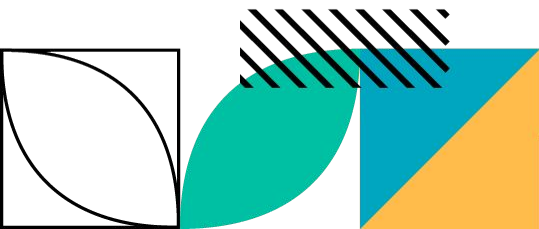
- 01 Making Selling Human
- 02 The Solution Selling Mindset
- 03 Processes that Drive 5-Star Experiences
- 04 The Results that Matter



Molly Rigatti

Director of Sales & Marketing

at Impulse Creative
an Elite HubSpot Solutions Partner



**IMPULSE
CREATIVE**



Special thanks to...

Remi

**Assistant
Director of Sales & Marketing**

at Impulse Creative
an Elite HubSpot Solutions Partner

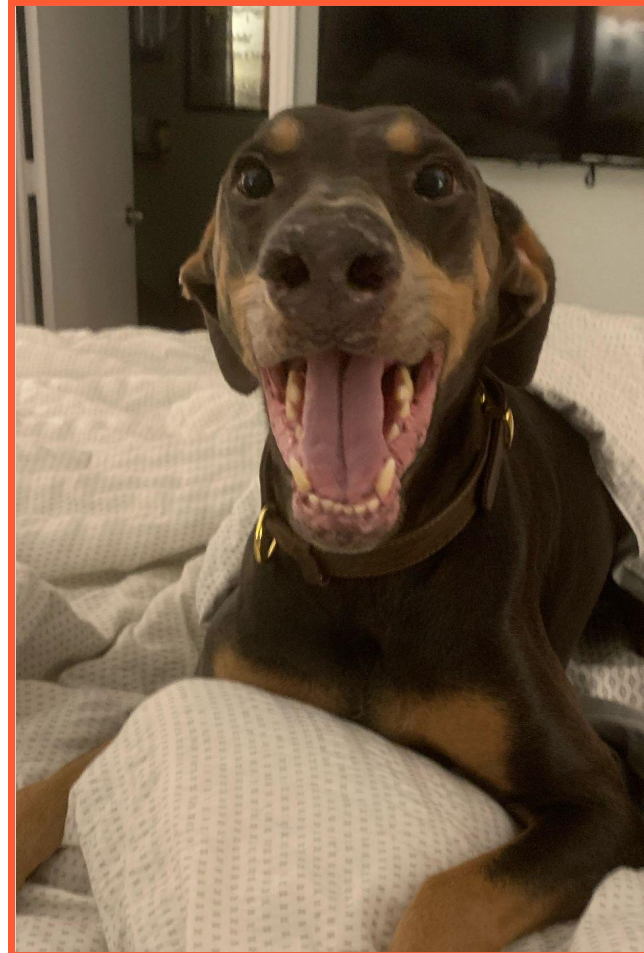


Special thanks to...

Raleigh

**Assistant to the Assistant
Director of Sales & Marketing**

at Impulse Creative
an Elite HubSpot Solutions Partner

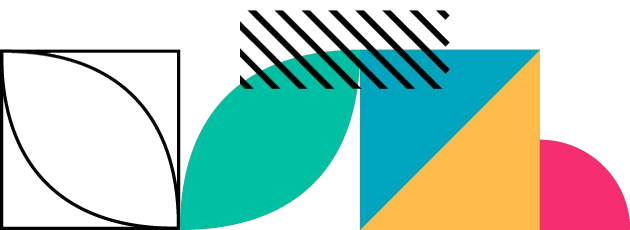


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SELL

≠

**one of those 4-letter
dirty words**

**What's the first word
that comes to mind
when you think about
SELLING?**

Tell us anonymously!



**What's the first word
that comes to mind
when you think about
HELPING?**

Tell us anonymously!



What's the first word that comes to mind when you think about HELPING?

75 Responses



What is solution selling?

Building a comprehensive story around your prospects' most important challenges and pain points as they align to their goals



The Story

[Prospect Company] helps

your prospect's personas

[Prospect Company] wants to

achieve some goal

But has a problem with

these specific things...

and these things...

and these things...

And is held back in solving these problems because...

this reason...

and this reason...

Until they meet us, and we...

do something special in the sales process

And we give them a plan to...

your value proposition

So they can transform from...

adjective

to...

adjective



The Story

[Company] helps

[Company] wants to

But has a problem with

And is held back in solving these problems because...

Until they meet us, and we...

And we give them a plan to...

So they can transform from...

to...

You're starting to
make your selling
more **human**
already...



One of the best ways to reinforce this practice?

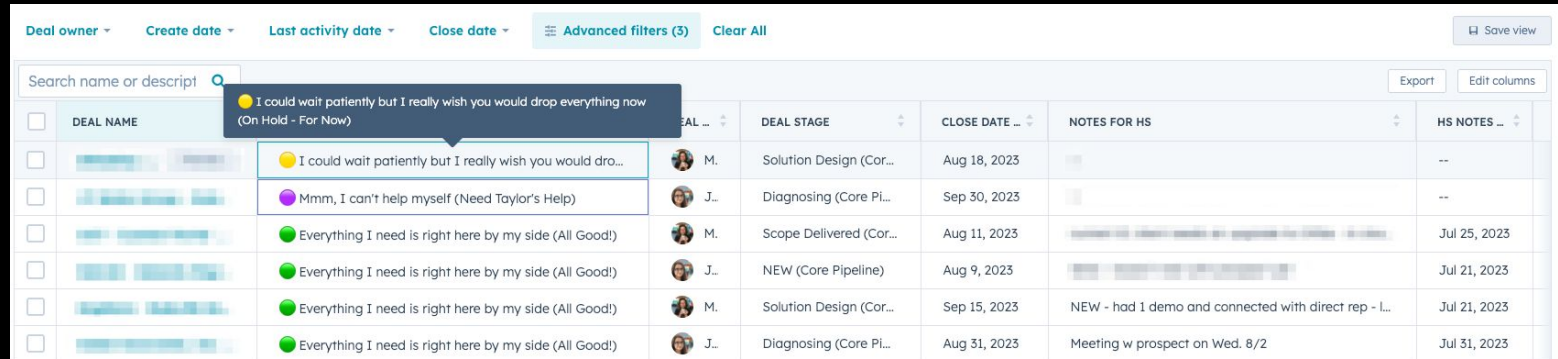
Make your CRM more **human** too.

The screenshot shows a CRM interface with a list of deals. A tooltip is displayed over the first deal, showing a yellow dot and the text: "I could wait patiently but I really wish you would drop everything now (On Hold - For Now)".

Deal owner	Create date	Last activity date	Close date	Advanced filters (3)	Clear All	Save view
DEAL NAME	DEAL STAGE	CLOSE DATE	NOTES FOR HS	HS NOTES		
I could wait patiently but I really wish you would drop everything now (On Hold - For Now)	M.	Solution Design (Cor...	Aug 18, 2023		--	
Mmm, I can't help myself (Need Taylor's Help)	J..	Diagnosing (Core Pi...	Sep 30, 2023		--	
Everything I need is right here by my side (All Good!)	M.	Scope Delivered (Cor...	Aug 11, 2023		Jul 25, 2023	
Everything I need is right here by my side (All Good!)	J..	NEW (Core Pipeline)	Aug 9, 2023		Jul 21, 2023	
Everything I need is right here by my side (All Good!)	M.	Solution Design (Cor...	Sep 15, 2023		Jul 21, 2023	NEW - had 1 demo and connected with direct rep - l...
Everything I need is right here by my side (All Good!)	J..	Diagnosing (Core Pi...	Aug 31, 2023		Jul 31, 2023	Meeting w prospect on Wed. 8/2

One of the best ways to reinforce this practice?

Make your CRM more **human** too.




The screenshot shows a CRM interface with a table of deals. At the top, there are filters for 'Deal owner', 'Create date', 'Last activity date', and 'Close date', along with 'Advanced filters (3)' and 'Clear All'. A search bar is on the left, and 'Export' and 'Edit columns' buttons are on the right. The table has columns for 'DEAL NAME', 'DEAL STAGE', 'CLOSE DATE', 'NOTES FOR HS', and 'HS NOTES'. A tooltip is visible over the first row, displaying a yellow note: 'I could wait patiently but I really wish you would drop everything now (On Hold - For Now)'. Below the tooltip, the first row of the table is visible, showing a deal in 'Solution Design (Core Pipeline)' stage with a close date of 'Aug 18, 2023'.

DEAL NAME	DEAL STAGE	CLOSE DATE	NOTES FOR HS	HS NOTES
[Redacted]	Solution Design (Core Pipeline)	Aug 18, 2023	[Redacted]	--
[Redacted]	Diagnosing (Core Pipeline)	Sep 30, 2023	[Redacted]	--
[Redacted]	Scope Delivered (Core Pipeline)	Aug 11, 2023	[Redacted]	Jul 25, 2023
[Redacted]	NEW (Core Pipeline)	Aug 9, 2023	[Redacted]	Jul 21, 2023
[Redacted]	Solution Design (Core Pipeline)	Sep 15, 2023	NEW - had 1 demo and connected with direct rep - I...	Jul 21, 2023
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」
**THE
MINDSET**





“When sales reps act as **informative agents** and **make prospects feel heard** when it comes to their needs, they’re more likely to **trust their recommendations**... [and] makes buyers more **open to suggestions**.”

Priorities

1

Build
Prospect
Relationships

2

Build
Partner
Relationships

Building Prospect Relationships

great relationships
make us a trusted
partner and advisor

Immediate Payoff:

closed deals = \$\$ towards goals

Long-Term Payoff:

bigger sales, repeat sales



Building Partner Relationships

great relationships
make us a trusted
partner and advisor

Immediate Payoff:

teamwork for
closing/commission

Long-Term Payoff:

recurring referrals for services



HOW?



STARTS WITH NEW HABITS

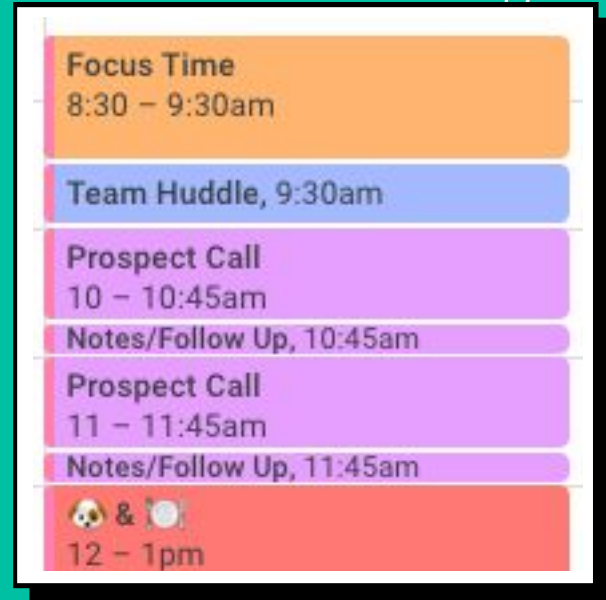
then... the process



1 Longer meetings

2 Dedicated preparation & follow through

3 Creating space for creative problem-solving



4 Spending more time listening

5 Asking questions – and lots of them

6 Being comfortable NOT having all the answers on the first call



Meetings



LAZER Meetings



LAZER Meetings

Listen

Acknowledge

Zip It

Explore

Respond



Listen

Acknowledge

Zip It

Explore

Respond

“I understand that you are looking for a customer portal, can you tell me a little bit more about what problems you solve for your customers and how this portal will improve their experience with you?”



Listen

Acknowledge

Zip It

Explore

Respond

“So it sounds like your clients are expecting _____ and you’d like a customer portal to help you deliver on those expectations by _____.”

Am I on the right track?”



Listen

Acknowledge

Zip It

Explore

Respond

KEEP THEM TALKING.

This is not the time to start deep diving into your functionality, features, service, or methodology.



Listen

Acknowledge

Zip It

Explore

Respond

“I have a few questions to...”

Be curious.

Don't take anything your prospects say at face value.

Keep diving deeper.



LAZER Meetings

Listen

Acknowledge

Zip It

Explore

Respond

Demonstrate
Understanding

Build Rapport &
Provide Value

Lock in Next Step



Let's go into my
HubSpot portal to
see the **LAZER**
Playbook in action



(Seller's Version)





Playbooks

lazer



Owner: Any ▾



NAME ↕



LAZER

● Published



LAZER (for Sales Admin)

● Published

(Seller's Version)

Playbook



LAZER

(10 minutes)

LISTEN 🗣️

"I understand that you are looking for [WHAT THEY WANT], can you tell me a little bit more about your company..."

your clients...

what you are looking to accomplish..."



Take Notes:

Notes

B *I* U ~~T~~ More ▾ 🗨️ 📄

ACKNOWLEDGE 👍

"Yes, we can build this for you."

- OR -

"I'm excited to talk to the team about this project"

Close



Playbooks

lazer



Owner: Any ▾



NAME ▾



LAZER

● Published



LAZER (for Sales Admin)

● Published

(Seller's Version)

Playbook



LISTEN

"I understand that you are looking for [WHAT THEY WANT], can you tell me a little bit more about your company..."

your clients...

what you are looking to accomplish..."



Take Notes:

Notes

B *I* U **More ▾**

ACKNOWLEDGE

"Yes, we can build this for you."

- OR -

"I'm excited to talk to the team about this project"

Zip It

"Tell me more about..."

Close



Playbooks



Owner: Any ▾



NAME ↕



LAZER

● Published



LAZER (for Sales Admin)

● Published

(Seller's Version)

Playbook



Zip It 🗑️

"Tell me more about..."

(25 minutes)

EXPLORE 📖

"I have a few questions to help paint a better picture for our team. Why are you looking for a customer portal? How do you think a customer portal is going to solve your current challenges and/or help you reach your goals?"

Be curious: Don't take anything they say at face value. Keep diving deeper. Ask questions like:

- "Why"
- "What else?"
- "Tell me more about [pain point, goal...]."
- "What tool are you currently using or plan to use for this?"



Take Notes:

Notes

B *I* U **More** ▾

Close



Playbooks

lazer



Owner: Any ▾



NAME ▾



LAZER

● Published



LAZER (for Sales Admin)

● Published

(Seller's Version)

Playbook



(10 minutes)

RESPOND

Demonstrate Understanding: "Great. It sounds like you have goals to.... [recap goals] but have a few things standing in your way [recap challenges]."

Build Rapport & Provide Value: "You aren't alone. Many of our clients originally came to us with these challenges and we've helped them [recap expected outcomes]/ There are a few ways we can help."

Lock in Next Step: "Before I can give you my best recommendation, I'm going to meet with the team to pull some resources and start fleshing out some paths we could take and the costs associated. Let's get a meeting on the books for (2-4 business days from today) so we can dive deeper into your current [systems, goals, processes, campaigns, whatever]. Is there anyone else who should be there?"

BOOK MEETING

"I'll send a follow up **today** with a recap and next steps. Thank you so much for your time."

Post Meeting Notes



What does this prospect do/sell? Why do they exist?

Update deal property (Company Overview)

Close

(Sales Admin's Version)





Playbooks



Owner: Any ▾



NAME ↕



LAZER

● Published



LAZER (for Sales Admin)

● Published

(Sales Admin's Version)

Playbook



LAZER (for Sales Admin)

Take Meeting Notes Here



General Meeting Notes

Notes

B *I* U ~~T~~ More ▾

Post Meeting Cleanup

General



Overall goals

Update deal property (Project Goals & Quick Wins)



WHAT does this prospect do/sell? Why do they exist?

Update deal property (Company Overview)

Close



Playbooks



Owner: Any ▾



NAME ↕



LAZER

● Published



LAZER (for Sales Admin)

● Published

(Sales Admin's Version)

Playbook



B I U More ▾

Post Meeting Cleanup

General



Overall goals

Update deal property (Project Goals & Quick Wins)



WHAT does this prospect do/sell? Why do they exist?

Update deal property (Company Overview)



WHO do they help/sell to? Who is the target audience we are focusing on with this project?

Update deal property (Personas)

Close



Playbooks



Owner: Any ▾



NAME ▾



LAZER

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LAZER (for Sales Admin)

● Published

(Sales Admin's Version)

Playbook



Project Notes



- What did they ask for?
- Why did they ask for it?
- How do they think it is going to solve their current problems or help them reach their goals?
- Do they need something different than what they asked for?
- What do you think our solution(s) could be?

Update deal property (Deal Description)

Notes

B *I* U **More ▾**



What project type are we leaning towards?

Update deal property (Project Type)

Notes

B *I* U **More ▾**



Any product involvement?

Close

Playbooks

lazer



Owner: Any ▾



NAME ▾



LAZER

● Published



LAZER (for Sales Admin)

● Published

(Sales Admin's Version)

Playbook



Any product involvement?

Update deal property (Product(s) of Interest)

Notes

B *I* U ~~T~~ More ▾

Their Tech Stack



What HubSpot do they have?

Update deal property (Has HubSpot)



How good do they know HubSpot? Do they have a dedicated HS team?

Update deal property (HubSpot Proficiency)

Notes

B *I* U ~~T~~ More ▾

Close



Playbooks



Owner: Any ▾



NAME ▾



LAZER

● Published



LAZER (for Sales Admin)

● Published

(Sales Admin's Version)

Playbook



Their Tech Stack



What HubSpot do they have?

Update deal property (Has HubSpot)



How good do they know HubSpot? Do they have a dedicated HS team?

Update deal property (HubSpot Proficiency)

Notes

B *I* U ~~T~~ More ▾



What other tech do they use?

Update deal property (Existing Tech Stack)

Timeline & Budget

Close



Playbooks



Owner: Any ▾



NAME ↕



LAZER

● Published



LAZER (for Sales Admin)

● Published

(Sales Admin's Version)

Playbook



Timeline & Budget



Let's talk about budgets :)

Update deal property (Fiscal year starts in...)



What's their timeline?

Update deal property (Clients Project Timeline)

Notes

B *I* U **More ▾**



What's their budget?

Update deal property (Client's Budget)

Notes

B *I* U **More ▾**

Close



Playbooks

lazer



Owner: Any ▾



NAME ↕



LAZER

● Published



LAZER (for Sales Admin)

● Published

(Sales Admin's Version)

Playbook



What's their budget?

Update deal property (Client's Budget)

Notes

B *I* U [More ▾](#)

Onboarding/Notes for their Service Team



Any notes for their onboarding to keep in mind? (For Josh or other)

Update deal property (Onboarding Notes)

Log call and create f/u tasks



What's next?

Update deal property (Next step)

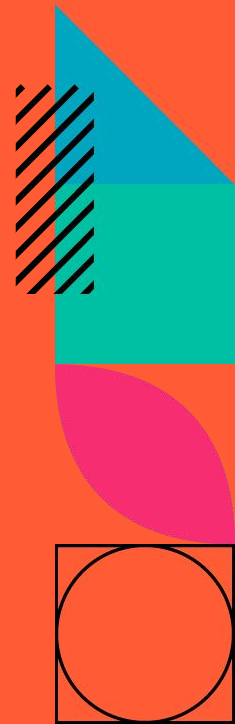
Close

How are we feeling
so far?



Intermission:
5-Minute
Dance Party
Playlist

THE
PROCESS



THE STAGES

30,000 ft view



Diagnose

Uncover, unpack
and document
your prospects'
goals, pains, and
needs

Design

Craft a solution
that includes
your best plan to
address their
needs + budget

Deliver

Tell the story of
how they will
reach their goals
and what role
you'll play

Diagnose

This is where we are having as many meetings and asking as many questions as we need to so we can truly understand what their core goals and challenges are.

Their challenges are not the deliverables they want but are the things that are holding them back from reaching their goals.

Design

Your solution is how you are helping them succeed.

Your solution should be focused on aligning and positioning your products, features, and/or services come together to achieve the specific outcomes your client is looking for.



Design

Design vs Architecture

Generally, acting as a **solution designer** means you evaluate all business requirements and present solutions to specific problems in the form of general services and/or products.

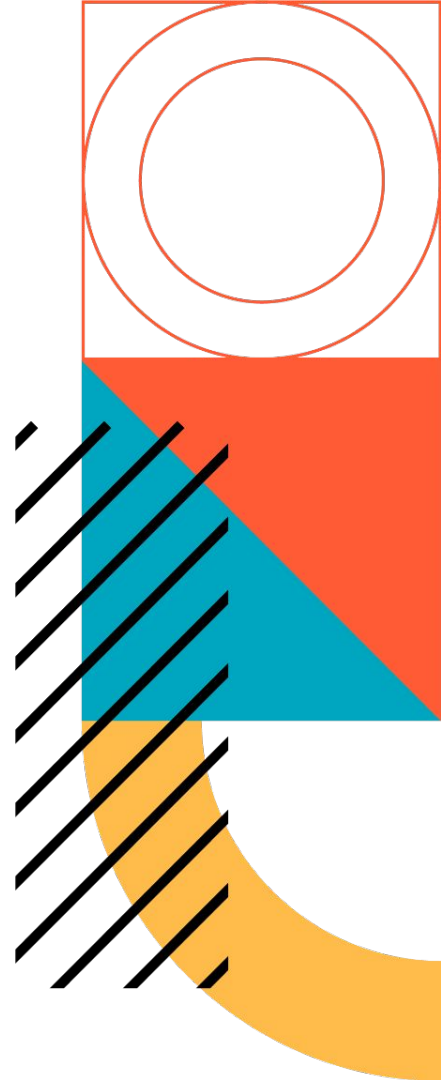
Conversely, acting as a **solution architect** means you also design the detailed components of the project and lead the technical vision.

Deliver

Your delivery of this solution can make or break the process. The experience you've given so far has built trust that you are an altruistic partner. Keep it up!

Tell the story directly and personally. Include pricing. Give them time to ask questions. Follow through with documentation.

Once the scope is delivered **follow-up** and **active listening** are your **#1 priorities** for this deal.



NEW 12 <	DIAGNOSING 25 <	SOLUTION DESIGN 14 <	SCOPE DELIVERED 14 <	VERBAL APPROVAL RECEIVED 2 <	CONTRACT SENT 4 <	>	>
<p>Close date: [blurred]</p> <p>Project Type: [blurred]</p> <p> LMS</p>	<p>Amount: [blurred]</p> <p>Close date: [blurred]</p> <p>Project Type: [blurred]</p> <p> LMS</p>	<p>Close date: [blurred]</p> <p>Project Type: [blurred]</p> <p></p>	<p>Amount: [blurred]</p> <p>Close date: [blurred]</p> <p>Project Type: [blurred]</p> <p></p>	<p>Amount: [blurred]</p> <p>Close date: [blurred]</p> <p>Project Type: [blurred]</p> <p> RocketPRM</p>	<p>Amount: [blurred]</p> <p>Close date: [blurred]</p> <p>Project Type: [blurred]</p> <p> LMS</p>	CLOSED WON	CLOSED LOST
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<p>Total: \$ [blurred]</p> <p>Weighted: \$ [blurred] (10%)</p>	<p>Total: \$ [blurred]</p> <p>Weighted: \$ [blurred] (20%)</p>	<p>Total: \$ [blurred]</p> <p>Weighted: \$ [blurred] (40%)</p>	<p>Total: \$ [blurred]</p> <p>Weighted: \$ [blurred] (40%)</p>	<p>Total: \$ [blurred]</p> <p>Weighted: \$ [blurred] (90%)</p>	<p>Total: \$ [blurred]</p> <p>Weighted: \$ [blurred] (90%)</p>		

INTERNAL ALIGNMENT

your pipeline is
your holy grail



The Art of the Pipeline Review




Solution selling can often be a team affair. Collaboration can help you build a truly delightful solution.

Understanding what's in your pipeline helps your sales team, your CS team, and your marketing team come together to streamline the experience for both you and your customers.



Pipeline Review Presenting Tips:

Deal Name
Amount: \$7,000
Close date: 08/31/2023
Project Type: Product

 RocketPRM

Note 3 hours ago
! No activity scheduled

Deal Name
Amount: \$85,000
Close date: 07/21/2023
Project Type: Web - Diagnostic,
Web - Project, Onboarding - HS

Email 2 days ago
Task due in 11 hours

- **Present the:**
 - Primary goals/challenges
 - Timeline
 - Where we are in the process
- **Keep it short and sweet to leave room for questions.**
- **Take notes! You may not always record your presentation but you + team will always have great ideas for messaging and scoping**

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THE RESULTS

○



We have the power to change...

Only 13%

of customers believe a sales person can understand their needs

[Source](#)

Nearly half

of sales reps feel they don't have enough information before making sales calls

[Source](#)

53%

of customer loyalty reported to be driven by the sales experience

[Source](#)

Where you'll see wins

For Your Customers

Lasting relationships

More Evangelists

For Your Team

Increased confidence

Better cross-department relationships

For Your Business

Higher TCV

More MRR

Better Data



INBOUND 23

Let's chat!

-  impulsecreative.com/learn/solution-selling
-  linkedin.com/in/mollyurigatti



[Post Sesh Fun Playlist](#)