



# Transitioning to a Virtual Sales World

---

March 2020

# Table of Contents

Transitioning to a Virtual Sales World



Tap any item from  
the contents

<b>Behavior Changes.....</b>	<b>3</b>
<b>Education and Communication Changes.....</b>	<b>6</b>
<b>Strategic Changes.....</b>	<b>7</b>
<b>System Changes.....</b>	<b>12</b>
<b>Links Appendix .....</b>	<b>13</b>
<b>Support.....</b>	<b>14</b>

# Behavior Changes



## Transitioning to a Virtual Sales World

1. **MAINTAIN YOUR ROUTINE** each morning. That means you get up at the same time, you shower at the same time, have breakfast at the same time and “leave for work” at the same time. Your daily disciplines cannot change, or they will be the first sign of a slide into bad habits and away from success.
2. **MORE STRUCTURE** than ever before is required in this new working environment. Without the familiarity of your routine, your new working accommodations could lead to a less structured workday. The key will be the exact opposite: more structure than you have ever applied before. Perhaps until now you have used a few hours, or even much of a day to plan your entire week. In this period, you will need to dedicate more of your workweek to building a better plan for your time. In addition, a more thorough examination of how to make that time productive will be necessary for success.
3. **TACKLE BIG THINGS FIRST** means lining up the most taxing and important tasks at the start of your day so that you address them while you’re at the height of your mental and emotional energy. You will want to get to those while you’re strong and fresh, as opposed to late in the day when you’re likely to be tired or maybe not as sharp.
4. **ADOPT POWER BLOCKING** in your calendar to tackle important things without breaking focus. When you sit down to watch a movie in the movie theater, you don’t constantly leave the movie to do things. You set that time aside and focus on the movie for the most part with few if any interruptions. Why would some movie get more respect and attention than your three most vital tasks each day? If you set up some power blocks and put them on your calendar you can get a ton done in a short amount of time.
5. **MORE COMMUNICATION** with your internal team than ever before. The daily operation of your business is now subject to ever-changing and updating circumstances, and as such you will need to be intentional about maintaining the best possible lines of communication with others in your organization. See this as an opportunity to lean in and improve your habits when it comes to communication, especially within the team. Build a plan for this into the structure of your day when and where possible.
6. **MANAGE YOUR EMAIL TIME** or you may look up and realize that you answered a lot of emails but didn’t execute your objectives for the day particularly well. Email can consume your time if you don’t have a good strategy to manage it. Identify the difference between important and urgent. Urgent items can be tackled quickly, while important items can be tackled in designated times on your calendar that were set aside for email.

# Behavior Changes

## Transitioning to a Virtual Sales World



7. **SET RULES** for your home office. Neither you nor your family is familiar with this new practice, and there will be a temptation for all involved to treat it casually. For your own success it is imperative that you set the appropriate rules for the space in which you're going to work, cutting down on interruptions, background noise and distractions. Commit to the rules and reassure your family that you have made accommodations to also engage them (see the next point.)
8. **MENTALLY REFRESH** on a regular basis throughout the day. As a salesperson you may never have found yourself in a position like this before. Spending extended amounts of time looking at screens and trying to connect without ever truly spending time with people will create a growing mental fatigue for many of you. Set time in your daily structure to recharge and refresh your mind. Step away from your screen and spend some face-to-face time with the people in your family, go for a walk, or spend time with a pet.
9. **MORNING HUDDLES** are a great way for your team to connect with one another each day and share wins, challenges, and opportunities. Ideally you should use a form of video conferencing for these calls so that you can see people's faces and make as human a connection as possible with your team. Sharing daily successes is one of the keys means of keeping everyone motivated and feeling connected as they head into the day. For a look at how a great team huddles once a week, have a look at [this video from Simon Sinek's team](#).
10. **GET PSYCHED!** Salespeople work best when they are on an emotional and energetic high. During this period, you may find disruptions to the normal flow of business, and that can be demoralizing and challenging for the mindset of salespeople—so combat that by stopping once or twice a day to do the things that really get you fired up. Rock some music, watch some inspiring videos, or call a great customer and get an update on how you've really impacted their business. Do what it takes to keep your mind in the right place for the day ahead!
11. **SELF-ENRICHMENT** is an opportunity that doesn't normally present itself during the workday, but with this new working situation you will have opportunities to improve your skills and knowledge. Take advantage of the day-long access to the internet to study, learn and improve. Break up hours of calls and video conferences with 15 or 20-minute learning breaks that enhance your performance. In this time, I'd specifically suggest using Google and YouTube to learn what successful inside salespeople do and determining what practices you can and should be applying to your own job.

# Behavior Changes

## Transitioning to a Virtual Sales World



12. **DIET, SLEEP & EXERCISE** may always be necessary for performing at your peak but looking after these things in the new remote world is even more critical than it has been in the past. They may seem optional over the short run, but each is vital across any significant period of time.

# Education and Communication Changes



## Transitioning to a Virtual Sales World

1. **EDUCATE** yourself on the new protocols and practices being performed by your business in accordance with recommendations and emerging guidelines for dealing with the COVID-19 world. Just like you educated yourself on the industry when you started, you will once again need to master new information and fully understand how it changes the ways in which your company is going to work.
  - a. **Understand What** has changed in the way your services are being performed.
  - b. **Understand How** these changes impact the client experience.
  - c. **Understand Why** these changes are important to all parties at this time. What is the purpose of them?
  
2. **NEW LANGUAGE** has emerged as a result of COVID-19 and it is important that salespeople lead the charge in mastering the talking points that will properly position both their company and our industry moving forward. Their ongoing communication with customers and partners across the industry provides an important opportunity to deliver and reaffirm messaging that needs to be universally adopted.
  - a. Essential Business Classification language was drafted jointly by IICRC and RIA. Review the document to ensure that you understand the essential services language and messaging and can cite it in conversation with customers who are uncertain about business continuity as it relates to restoration. [Read the document here.](#)
  - b. “Clean And Apply Disinfectant” not “clean and disinfect” is the right language to use when discussing cleaning services, as outlined in the [RIA Preliminary Report.](#)
  - c. Personal Protective Equipment (PPE) is familiar to most of you but hasn’t made its way into your regular sales language. That needs to change as you take steps to help customers understand how your company is working and what steps it is taking to ensure not only that people are being protected, but that it can perform vital services while maintaining health and safety standards.

# Strategic Changes

## Transitioning to a Virtual Sales World



1. **NO MORE COLD CALLING** during these times. Instead of trying to break the ice with people who are already dealing with dozens of other salespeople cold calling them, let's set that practice aside in favor of focusing on warm leads. That means reaching out to:
  - i. Existing partners first and foremost. Talk to those people who are already doing business with you and see how you can solve new problems they are experiencing for the first time.
  - ii. C1s (and potentially C2s) from your LuxorCRM system represent people who are familiar with your brand and have worked jobs with you before. Use your history with them, combined with this unique period of need, to see if there is an opportunity for your company to assist them.
  - iii. Inbound leads created by sophisticated and thought-provoking marketing tactics applied through mail campaigns and social media.
  
2. **MORE, BETTER QUESTIONS** are necessary during this time, as you cannot afford to continue to have "fluffy" conversations. Yes, you need to show empathy and check in on everyone's health, but after that you need a plan to properly identify opportunities to assist partners in a meaningful way. Making calls just to stay top of mind won't be enough for the salespeople who want to ensure that they don't lose their year while traditional claims slow down.
  
3. **IMPROVE YOUR RESPONSE TIME** in this new working environment. As you work from a new virtual world, mastering response times has an incredible impact on your success. If a client or potential client reached out to you, make sure you are set up to respond VERY QUICKLY! According to a data study done by Xant when a sales rep responds within 5 minutes instead of 30 minutes, they see a performance improvement of 21x in qualifying and converting the opportunity.
  
4. **SOLVE PROBLEMS** instead of trying to sell services. Everyone in the industry is talking about how they can clean and sterilize, and it's a very relevant topic. Turning this situation into a bigger opportunity though is about listening to issues, understanding the pain and then presenting solutions. The salespeople who do the best job of this will position themselves for far greater results both during this time and moving forward.

# Strategic Changes

## Transitioning to a Virtual Sales World



5. **NEGATIVE SELLING** may be a necessary tool in your toolbelt during this time. Rather than tirelessly chasing people who seem disinterested or “too busy” to meet with you, it might be time to acknowledge their lack of interest and suggest to them that they may not believe in the solutions you’re providing or see an immediate need for them. If they’re willing to acknowledge that, you can save critical hours every week by changing your focus to better opportunities.
6. **TAKE AN INFINITE MINDSET** at every available opportunity. Salespeople who are hungry for the job today aren’t a bad thing, but they may come off as insensitive and callous in the current climate. Solution-oriented selling that focuses more on the customer’s timeline and needs will better position you to be doing business with them on an ongoing basis. There is a long and challenging year ahead, and as a trusted partner you will have multiple opportunities to serve the people who have confidence in you.
7. **GATHER INTEL** early and often to get a better understanding of what is going on in the market. If claim volume is down, what is causing it? What do your contacts expect to happen over the next week? The next month? Are adjusters getting concerned for their jobs? Are agents giving any additional direction to their clients? What mandates have property managers received from their companies and how is that impacting their daily life? Learn, learn, learn! The better the intel you gather, the more informed your strategies will be moving forward.
8. **TRANSITIONING TO VIRTUAL MEETINGS** might seem obvious, but make sure you think through what that meeting experience is going to look like. Do you have information to share? How will you share it? Will you have a camera on to allow your client to see you? Preparation and planning are required to effectively transition to the new virtual medium, especially for those who have never navigated it before. Being smooth and polished will help deliver confidence—while struggling or being uncomfortable will also send a message to your customers.
9. **VIRTUAL TRAINING** may be an option for continuing to provide value-added services like CE classes and lunch-and-learns. Who says you can’t send lunch and then give a virtual presentation to the clients that you have been working hard to connect with in recent months? Expand the idea of your transition to virtual meetings to an even larger engagement!

# Strategic Changes

## Transitioning to a Virtual Sales World



10. **LEVERAGE NEW TOOLS** to drive confidence and interest in this new way of connecting and doing business. One great example for those of us constantly trying to set meetings is to use a meeting app (at Next Gear we use Acuity) to let partners schedule their own meetings. That puts the power in the hands of your partners to identify the best time to connect with you and to adjust it if they need to. It also helps them “buy in” to the new normal, and their comfort makes our selling process more effective.

11. **LEVERAGE CHAMPION CUSTOMERS** effectively as you search for new business opportunities. Why were you cold calling strangers when the people who already know, like, and trust you have industry relationships that they can walk you into and provide an endorsement to? If you have been providing real value to clients, this is not a major ask. If it feels like it is, you may need to increase your value-add for customers. This should be every salesperson’s #1 tactic for adding new business partners.

12. **BE PERSISTENT** in your efforts. Studies show that the average sales rep in the U.S. gives up after 1.5 call attempts. Data suggests that the ideal number of attempts to connect with a contact is six to nine, which supports Tiffany Peterson’s position on The Law of Four Interactions, [which can be found here](#). Despite being focused on widget sales, there is a lot of important information for our relationship based sales people to learn from this. In addition, because you need to plan for six to nine interactions, the next point is critical.

# Strategic Changes

## Transitioning to a Virtual Sales World



13. **DETERMINE YOUR CADENCE** for executing the six to nine touches you need to connect with customers and potential customers. Understand what your sales strategy is going to consist of, and what the intervals of engagement are going to be. Make sure that you change it up with regularity to stand out from the noise. Sales Expert Jeff Hoffman recommends an eight-touch cadence that takes 29 days to complete for prospecting, but it may be a strong guide for us to consider for all unresponsive customers during this time. It is:

Day 0: First touchpoint

Day 14: Second touchpoint

Day 21: Third

Day 25: Fourth

Day 27: Fifth

Day 28: Sixth

Day 29 (morning): Seventh

Day 29 (afternoon): Eighth

Equally important to the timing is the sequence of touches and the correct messaging for each one.

14. **LEVERAGE TECHNOLOGY** to enhance your value-added services to customers. Can you be providing virtual services and expertise to assist policy holders in mitigating issues during this time when they may not want people in their home? Is such a new offering marketable and a way to better position yourself with customers as you move forward?

15. **SOCIAL MEDIA QUALIFYING** will help you better understand your customers' online presence. With an increase in screen time being driven by the isolation protocols being put in place, understanding what platforms your customers use, and where they spend their time when they're online will better equip you to reach them with new marketing messages (see next point). It also allows you to identify where you can engage them in groups that might enhance the exposure of your brand and validate it to their peers.

# Strategic Changes

## Transitioning to a Virtual Sales World



16. **LEAN INTO SMART MARKETING** tactics that can help you distinguish your company from your competitors in the marketplace. Today there are email campaigns being launched by the hour, with a surprisingly consistent message regardless of the source. The message will largely get lost in the noise, so leaning into marketing with strong, innovative tactics that generate meaningful interest and provide opportunity for warm calling as a follow-up is where separation from the pack will occur.

17. **GO DEEP, NOT WIDE** is something we've been teaching at Champion Days for years and during this time it is more relevant than ever. The goal in this time isn't for you to get in touch with or in front of everybody—it's for you to get in front of the right people, to go deeper with your partners and solidify the right relationships. Gary Vaynerchuk says it differently but [his message resonates](#) as we talk about marketing.

18. **EXPLORE NEW MEDIUMS** for connecting with clients. With your marketing approach now being challenged to grow, is there a way to connect with your audience that replaces your ability to get in front of them or even to have meetings and calls with them? What about blogs? What about podcasts? What can you leverage to bring additional value to your industry and your partners?

19. **STOP DABBLING** in social media. Now is the time for you to double down and commit to leveraging the new information platforms to connect with people and explode your brand. If you need thoughts on how to do this at the highest level, turn to Gary V (again) and check out his [thoughts on how to make a meaningful impact on social media](#) as well as his guide to [how to succeed on Twitter](#).

20. **FORECAST A SURGE** if there has been a sudden and unusual decline in your traditional claim mix. Statistically there is a lot of consistency (as reported by ISO at the [Insurance Information Institute](#)) in traditional claim volume, so if your market is showing an unexpected downturn in volume, forecast a surge. Start talking to customers who may be "sitting on" claims and waiting for the current environment to change before submitting them or asking for service. If that occurs and weeks or months' worth of deferred claims release at once, you could find yourself in a surge situation without a weather event. Ask the right questions of your partners and coach them on how to properly prepare for this. It should be a scheduling conversation, not a referral conversation.

# System Changes

## Transitioning to a Virtual Sales World



1. **HAVE A CAMERA** in order to empower you in this new virtual world. It goes a lot farther in web sessions and web calls when people can see you.
2. **HAVE THE RIGHT SOFTWARE** to drive your new working environment. Tools make a difference, so make sure you can create content (for social media), track effectiveness (through LuxorCRM) and empower partners to schedule meetings (using Acuity).
3. **ADD FIELDS** to track new measures in LuxorCRM. The fluidity of the system allows for the addition of new fields to allow you to track new strategies and measure their effectiveness. When in doubt, contact our Help Desk (support@nextgearsolutions.com or 866-769-7855) to find out how best to perform this action.
4. **BUILD REPORTS** to measure your new business model and determine its effectiveness.
5. **USE OPPORTUNITIES** in your LuxorCRM environment to manage your cadence and move contacts through a touch cycle without losing track of where in the process you are and when to next take action.

# Links Appendix



## Transitioning to a Virtual Sales World

Virtual team huddle: [www.youtube.com/watch?v=tKEtm3HCrs&t=535s](https://www.youtube.com/watch?v=tKEtm3HCrs&t=535s)

Going deep, not wide: [www.youtube.com/watch?v=4fsYWXrGGcE](https://www.youtube.com/watch?v=4fsYWXrGGcE)

How to make a meaningful impact on social media: [www.forbes.com/sites/toward/2018/11/13/gary-vaynerchuk-how-to-blow-up-on-social-media/#1c64ce0e24e0](https://www.forbes.com/sites/toward/2018/11/13/gary-vaynerchuk-how-to-blow-up-on-social-media/#1c64ce0e24e0)

How to succeed on Twitter: [s3.amazonaws.com/gv2016wp/wp-content/uploads/20140324201941/social\\_platforms\\_infographic\\_Twitter\\_02.png](https://s3.amazonaws.com/gv2016wp/wp-content/uploads/20140324201941/social_platforms_infographic_Twitter_02.png)

Insurance Information Institute: [www.iii.org](http://www.iii.org)

RIA & IICRC Joint Letter To Government: [https://www.restorationindustry.org/resource/resmgr/RIA-IICRC\\_Joint\\_Letter-Exec.docx](https://www.restorationindustry.org/resource/resmgr/RIA-IICRC_Joint_Letter-Exec.docx)

RIA & IICRC Preliminary Report For Restoration Contractors Assisting Clients With COVID-19 Concerns: [https://cdn.ymaws.com/www.iicrc.org/resource/resmgr/docs/RIA\\_Preliminary\\_Report\\_for\\_R.pdf#utm\\_source=1700&utm\\_medium=2031&utm\\_campaign=3070&utm\\_term=4002&utm\\_content=5688](https://cdn.ymaws.com/www.iicrc.org/resource/resmgr/docs/RIA_Preliminary_Report_for_R.pdf#utm_source=1700&utm_medium=2031&utm_campaign=3070&utm_term=4002&utm_content=5688)

The Law of Four Interactions: <https://www.youtube.com/watch?v=5aNRWIGbEYs>

# Support

## Transitioning to a Virtual Sales World



The Next Gear Solutions support specialists are available to help you leverage your company's training to the fullest extent. Simply click the Live Support link on any page or contact us through the channels below.

**Phone:** 1-866-769-7855

**Email:** [support@nextgearsolutions.com](mailto:support@nextgearsolutions.com)

**Hours:** 24/7

Next Gear also offers free daily training sessions 5 days a week. These sessions will feature a different section of the application each day. The registration links for the training sessions will be emailed to our mailing list of Administrators the week prior to the trainings.



**NEXTIGEAR**<sup>™</sup>  
S O L U T I O N S

The Leading Platform for Property Restoration

📍 304 Heritage Drive, Suite 2 Oxford, MS 38655  
🌐 [nextgearsolutions.com](https://nextgearsolutions.com)  
☎ (866) 769-7855