

Shadow Project

With Jake Higgins

From

Qualtrics



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Introduction

Company Background

Qualtrics was founded in 1997 by Dr. Scott Smith, who is currently a teacher at Brigham Young University. Scott graduated from BYU in 1971 studying marketing, statistics, computer science and economics. He received his MBA from Michigan State University two years later and in 1979 received a Ph.D. from Pennsylvania State University in Marketing, Quantitative Methods and Social Psychology. Scott taught at the University of Oregon for three years before returning to BYU in 1981 where he has taught since. For a long time the only people who had access to Qualtrics were Scott's close friends and a bunch of his MBA students.

Qualtrics has worked with leaders in nearly every industry for thirteen years now and has become the premier provider of survey research software to 20 percent of the Fortune 500, 30 of BusinessWeek's Top 30 Business Schools, over a quarter of the Fortune 100 as well as leading government/non-profit entities. Since founding Qualtrics, Scott Smith has entrusted the company with his son Ryan. Qualtrics has completely revolutionized research and made it available to the everyday researcher.

Background on Salesperson

I had the opportunity to shadow Jake Higgins, who serves as the assistant team leader for the European team at Qualtrics. Jake has worked at Qualtrics for a little over a year and a half now and he was made the assistant team leader about seven months ago. When Jake first started working for Qualtrics, he had never had any previous sales experience and he was only the 60th employee employed at Qualtrics. The company now has over 150 employees, but it has been fun for Jake to be able to witness the startup process of the company and see it expand over the last

year and a half. Jake is currently studying Business with an emphasis in Supply Chain here at BYU and he plans to graduate in April 2011.

Products Sold and to Whom

Qualtrics sells an online survey software tool that is extremely easy to use. Qualtrics allows users to be able to build their own online survey and distribute it to recipients. Qualtrics also allows users to embed data to personalize greetings or even set quotas to ensure a representative sample. The survey flow is extremely simple for users to understand because they can customize it to their own personal style, look, and feel by being able to use skip/display logic, randomize the questions, or even choose the type of question they would like from a large selection. In addition, if users are not quite sure how to set up their own survey, a Survey Library is offered that contains hundreds of survey examples and questions for them to copy and use.

Qualtrics sells to corporations, academic universities, and government/non-profit companies all over the world. Their client list includes companies such as Nissan, Forbes, Nu Skin, Microsoft, Kellogg, HP, and many more. Their academic client list includes universities such as Cambridge University, Columbia University, Berkeley, BYU, and many more. As I mentioned before, their client list includes all 30 of BusinessWeek's Top 30 Business Schools, as well as all the main cruise lines. Basically, Qualtrics sells to anyone needing to do quantitative research.

Product Knowledge and Selling Skills Needed

At Qualtrics, knowledge of the product is absolutely crucial because salespeople are constantly showing online demonstrations to their clients. It is important for the salesperson to know how to use the software extremely well and be able to answer any questions clients might

have concerning Qualtrics' main competitor, Survey Monkey. Many times the buyer will point out a feature or advantage that their competitor offers, and the salesperson needs to know when and how to overcome the objection and continue on with the sale. It is important for the salesperson to clearly highlight the benefits of the Qualtrics software so that the buyer has no reservations about it being the best research software available. Not only is the salesperson selling the software to their clients, but they are also demonstrating to the client how to use and become familiar with the software as well.

There are definitely certain selling skills that are needed in order to be able to sell at Qualtrics. The salesperson must be confident in their ability to not only sell the software but in their ability to build a relationship with the buyer. A lot of times buyers are hesitant because they rely on typical stereotypes which tell them salespeople are conniving and aggressive. It is important for the salesperson to get rid of this stereotype in the buyer's mind by building a relationship with them first and proving to them that they can be trusted. Also, a salesperson needs to be outgoing and friendly in order to be liked by the buyer. And finally, a salesperson needs to be a great communicator and be able to sound intelligent over the phone. This is especially crucial because the salespeople at Qualtrics are speaking with corporations and academic universities that are extremely prestigious and they will not take the salesperson seriously if they do not appear to be very intelligent.

Sales Calls

Strengths and Weaknesses of Selling Presentations

Having the opportunity to shadow Jake as he made calls to several clients was very enlightening to say the least and I definitely learned a lot from the experience. I saw examples of several strengths, as well as a few weaknesses as I observed Jake making sales calls. The

purpose of most of the calls we made was to strengthen the relationship with the buyer or to see if they had received the email Jake had sent them. One of the calls we made was to actually perform an online demonstration with them and show them exactly how Qualtrics works.

Strengths

Jake had several strengths in his sales calls, including his ability to relate to the buyer early on in the call and build a connection with them. He did not come across as too pushy or aggressive which made the buyers naturally trust him and want to talk with him. Oftentimes he would engage in small talk with the buyer for the first 2-3 minutes of the call. He was very strategic about connecting with the buyer in that he could sense whether or not they actually wanted to chat with him at first or not. For example, one of the buyers seemed to be in a bit of a rush on the phone; therefore, Jake got straight to business and was able to uncover who the decision makers were at the University early on. This seemed to work really well with that particular buyer though because otherwise the buyer might have gotten annoyed early on in the conversation and perhaps would have thought that Jake was just wasting his time. Jake was also very accommodating and helpful in his conversations with the different buyers. For example, one of the buyers wanted to see a pricing document as well as a licensing agreement from Qualtrics before he made a final decision and so Jake promised that he would send those documents along. Not even thirty seconds later, Jake was already forwarding those documents on to the buyer. It is important for a salesperson to not only be sincere in his promises to the buyer, but to be punctual and deliver the promised documents to the buyer as soon as possible.

Weaknesses

Although Jake was an excellent salesperson and has developed many skills in his ability to communicate with others, he also had some weaknesses as well. One of the main weaknesses I saw throughout each of his calls was that rather than genuinely listening to what the buyer has

to say, he was constantly engaged in other activities such as sending emails during his sales calls. Although the buyer is unable to actually see what Jake is doing on the other end, oftentimes the buyers can still pick up on things like that and might question Jake's sincerity. Another weakness I noticed was that sometimes Jake would start to speak really fast, especially when he was explaining the primary benefits that Qualtrics offers. One of the buyers even asked Jake to repeat some of the things he had said. It is important to speak slowly and clearly to the buyer so they can understand everything the salesperson is saying.

Nonverbal Communication

After observing Jake, I learned just how much nonverbal communication influences everything about the sales call. Jake is a very relaxed individual and he would usually sit back into his chair as he talked with each of the buyers. Although many people might perceive this as being unprofessional, I was able to notice firsthand just how beneficial this was in making the buyer feel at ease. None of the sales calls felt awkward or uncomfortable in the slightest. Jake also used his hands a lot as he explained the detailed features of the Qualtrics software. This helped Jake be able to explain the software in a simple way that the buyer could understand. Also, because Jake works on the European team, he usually has to work very early hours in the morning because of the time difference. He usually works from 3:30 AM to 9:00 AM depending on the day and so oftentimes he is extremely tired as he talks to clients on the phone. Thus, many times he will stand up and look out the window while he speaks with buyers in order to stay awake and be able to maintain his outgoing personality.

Objection Handling

There were not very many objections that came out during the sales calls I sat in on so I mainly talked with Jake about ways that he normally handles objections. He said the biggest objection the European team experiences by far is price. The U.K. recently announced 40%

budget cuts so many buyers are concerned about how expensive the Qualtrics software is. In order to overcome these types of objections, Jake is always very flexible with budget constraints and usually he will set the buyer up with a free trial for a few months so they can just try it out. Once the trial period ends, most of the buyers will realize just how advantageous the Qualtrics software is and they will usually find a way to be able to afford it.

Closing and Asking for the Order

One of the main tactics Jake used in closing the sale was once the buyer seemed really interested in what Qualtrics had to offer, Jake would go ahead and share his end goal with the buyer. As Jake and I spoke about this particular tactic, he related it to missionary work—it was never a “surprise” when he suggested that an investigator get baptized because the investigators always knew that was the intent of the missionaries in the first place. So once Jake has established rapport with the buyer and has overcome all objections, he reminds them that his end goal is to sell the software. That way, both he and the buyers know exactly what the end goal is and it is not a surprise when he asks for the close. I am not sure if this is the best way to go about it in sales or not, but it seemed to work very well for Jake.

Ways that Qualtrics Maintains Relationships with Customers

Maintaining close relationships with customers is very important at Qualtrics. One way that they maintain those relationships during the holiday season in particular is they always send out Christmas cards to each of their customers every year. Although this may seem very trivial, it is seen as very thoughtful and genuine to the customers. Also, the salespeople at Qualtrics make a conscious effort to visit with their customers at least once a year. This last summer, Jake and a few of the other salespeople went to the U.K. and took a few of their customers out to lunch. It is important for a company to show appreciation to their customers in as many ways as they can.

Buyers Interview

Why Buy from Qualtrics rather than Others?

Jake was very helpful with this because he actually made a follow-up call for me in which I had the opportunity to speak with one of Qualtrics' current customers, Professor Ralph Tench from the University of Huddersfield in London. Professor Tench has been doing business with Qualtrics for a little over six months now and has been very pleased with the overall software and customer service he receives at Qualtrics. When I asked him why he chose to buy from Qualtrics rather than anyone else, he told me that the decision was easy for him because Qualtrics offers such an incredible software unlike any other he has ever seen or used. One primary benefit he pointed out was that the software offers unlimited responses, unlike all of its' competitors that only offer a certain amount of responses. Also, they offer free customer service at any time. So if Professor Tench ever has a question or a concern, he can call and talk to a representative for as long as he needs to without any charge. He also talked about how the program is extremely user-friendly and anyone can use it.

What are the Main Benefits they look for when buying?

Buyers, such as Professor Tench, are looking for the best research tool in the industry. Of course, they want a high-quality, advanced software program that is not going to cost them an arm and a leg. Price is obviously a huge factor for most buyers, but they are usually willing to buy the product if they are able to see the benefits it offers firsthand. Professor Tench also talked about how he looks for software that will take away most of the headache that comes along with technological problems and failures. He wants a research tool that is straightforward and easy to use.

How does the Salesperson influence their Decision?

Professor Tench expressed the importance of having a salesperson who is extremely knowledgeable about the product and who is going to help the buyer see what's in it for them. As selfish as it may seem, most buyers are only interested in buying a particular product if they can see the value that is offered to them specifically. Professor Tench also admitted that he probably would have never been interested in seeing a demonstration from Qualtrics had he not liked the way Jake went about highlighting the specific benefits they had to offer. It is important for the salesperson to be confident without coming across as overly pushy.

What Makes a Good, Bad, and Ugly Salesperson?

Professor Tench talked about how a good salesperson is someone who knows how to manage the relationship. It is important for the salesperson to let the buyer guide the conversation at the appropriate times, as well as take charge when necessary and be confident in that process. He also talked about how a good salesperson is someone who is honest and trustworthy and who can portray those qualities to the buyer right away. Professor Tench said that "it doesn't matter how great the product may be, if the salesperson doesn't have the buyer's trust, the buyer is never going to agree to the sale."

Professor Tench said that a bad salesperson is someone who makes the entire conversation awkward by either being too passive or trying to make weird, inappropriate jokes. Most buyers do not want to waste their time talking to a salesperson who does not know how to take the initiative or who just rambles on and on about pointless things. He also said that a bad salesperson is someone who the buyer can tell does not care about them individually, but is simply just trying to make a sale. It is important for the salesperson to be genuine and sincere.

And finally, Professor Tench said he has not dealt with very many “ugly” salespeople, but he would guess that an ugly salesperson is someone who knows absolutely nothing about the product they are selling. If the buyer asks the salesperson a question about the product and they do not have anything to say or they do not know the answer, then that will turn the buyer off pretty quickly. Also, Professor Tench said an ugly salesperson would be someone who comes across as mean and selfish.

Summary

Main Takeaways

I definitely learned some very valuable lessons from this experience. I gained a new insight on what it takes to be an effective salesperson and how to gain the necessary skills in order to be successful. Specifically, I have learned that sales affects every aspect of our lives, sales can be fun and exciting, and also sales requires hard work and persistence.

Sales Affects Every Aspect of our Lives

Developing the ability to sell is one of the most important skills we can acquire because it affects every aspect of our lives. Obtaining good selling skills translates into our personal lives and naturally makes us a little more personable and confident. Whether we are giving a talk in sacrament meeting or just introducing ourselves to a new friend or co-worker, we are more confident in the way we present ourselves. Also, going along with that concept, selling teaches us a lot about ourselves and how we come across to others. A lot of times the way we *think* we are coming across to someone we have never met is a lot different than the way they think we come across. I know in my own personal life it is important for me to acquire these types of skills so I can be the best wife and mother I can be, as well as be diligent in my church callings

to serve the Lord. When I think about the skills that I have learned from selling, I know that they will help me immensely as I go throughout my life and build genuine relationships with others.

Sales Can be Fun and Exciting

A lot of times people associate sales with an uncomfortable and boring setting. After taking this class as well as shadowing Jake in his sales calls, I have learned that sales can be the exact opposite of what most people think—it can be fun and exciting. One of the most enjoyable things about sales for me is that I get to interact with people from all over. In Jake's case, he gets to interact with people from a completely different country. If that is not exciting, then I do not know what is. I really enjoy getting to know other people and learning how to adapt to everyone's different personalities. It is often very challenging to adapt to personalities that are so different from my own, but that is why I love it so much. Also, sales is much more fun if you are enthusiastic about the product you are selling and let your passion for that product shine through.

Sales Requires Hard Work and Persistence

I never thought that selling was a piece of cake but now I know for myself just how difficult it can be at times. As I observed Jake, I became very aware of how many phone calls he makes and how many emails he sends out every single day. It is not an easy task to try to gain the trust of your buyers, as well as build long-lasting relationships with them. Being a successful salesperson requires persistence because without it, the salesperson would just give up on a sale after the first objection. Salespeople really need to know how to push through the objections and keep the conversation flowing. Also, I noticed that a lot of times buyers are busy and they do not really have interest in speaking with you. Therefore, it is important to know how to work hard in selling *yourself* as well as the product so that the buyer will actually be willing to give you some of his time.

I have learned a lot from not only taking this class, but from doing this sales shadow project. It has been very exciting for me to be able to see firsthand how the principles we have learned in class apply to real-life selling situations. This class has taught me invaluable skills that will be extremely useful as I go forward with my professional and personal life.