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## A Seat at the Table

### How Top Salespeople Connect and Drive Decisions at the Executive Level

#### THE SUMMARY IN BRIEF

To close more sales, stop selling.

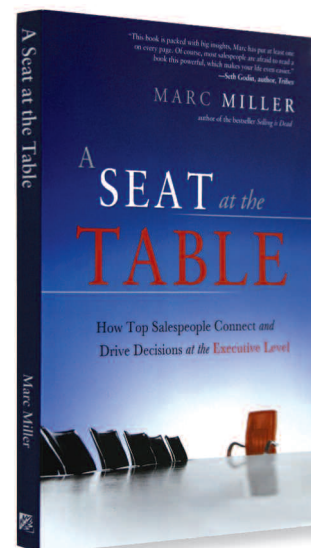
Sales expert Marc Miller offers a new sales approach designed to help you earn “a seat at the table” — the place reserved for those select people who set the direction and the budget of an enterprise.

In today’s commoditized business world, customers only care about one thing: value. To offer real value, you must stop being a salesperson and become a businessperson who sells. Only then can you help your customers increase productivity and profitability, which are the key factors of growth — and your continued success.

This summary explains how to connect with executives and decision makers from the very first point of contact — psychologically, strategically and financially — to prove your value. When you can do this, you will be able to create demand for your products and services, protect your core business and close more sales. Building on his experiences identifying best practices of thousands of salespeople, Miller offers all the tools you need to close more and bigger deals.

#### IN THIS SUMMARY, YOU WILL LEARN:

- How to use a simple, analytical matrix for illuminating customer strategies.
- How to use a methodology that will have every contact offering up the information that you need to make the sale.
- How to generate recommendations that are perfectly aligned with customer strategic needs.
- How to close more and bigger deals — and help your customers succeed.



by Marc Miller

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# THE COMPLETE SUMMARY: A SEAT AT THE TABLE

by Marc Miller

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*A Seat at the Table: How Top Salespeople Connect and Drive Decisions at the Executive Level* by Marc Miller. Copyright © 2009 by Marc Miller. Summarized by arrangement with the publisher, Greenleaf Book Group Press. 184 pages, \$19.95, ISBN 978-1-929774-69-2.

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## Game Change

All of the difficulties companies are facing in our turbulent, constantly shifting economy are actually creating the opportunity of a lifetime for salespeople — specifically, the opportunity to play a far more important role in the lives of the customers on whom they call. For those special salespeople who embrace this new role, the world will be one of endless opportunity. Their customers will see them as difference makers, champions who deliver value far surpassing that of any single product or service.

There is new evidence to suggest that salespeople can transcend their current “brand” as product peddlers to achieve record levels of productivity. But, to do this, they must accept one simple truth:

***The only thing your customer cares about is value.***

To achieve radically better sales results, you must become radically more valuable to customers — strategically valuable. The game has changed, and research suggests customers are pleading for a new and different type of value from salespeople. And, when this new value is created, captured and delivered, customers no longer view salespeople as salespeople at all. They now see “businesspeople who sell” — people who are worthy of a seat at their table.

## Earning a Seat at the Table

Customers today are looking for value in the form of help — specifically, strategic help. Corporations are under duress as never before — business failure and executive turnover are at an all-time high, and business models need adjusting not once every year, but seemingly every week. And executives often get lost in this rapid pace of change. They need to focus on the future,

but the day to day of running a business is like gravity, a force that continuously drags them down into the daily muck, battling the fires necessary to drive short-term results. As a result, senior executives often get off track, becoming disconnected from the real purpose of their organizations — to sustain profitable growth.

And this is where you come in. You have an opportunity to play a new role, and that new role has two distinct parts. First, you have to help executives reconnect to their strategies. When you help customers reconnect to what’s important, you connect to them. Second, you need to devise solutions that will help them achieve or expand their master strategic plan.

Quit talking about expenses (products and services) and start having discussions about investments (productivity and differentiation). From the perspective of the executives you will be calling, these are polar opposites. Comprehend your customer’s strategies and connect your products and services to them. This is how you will earn a seat at the table — that lofty position that executives reserve for those special businesspeople who add strategic value, who make a profound impact on their results, their enterprises and their people. ●

## A New Role, A New Mind-Set

To successfully engage at senior levels, salespeople need to abandon the old ways — in effect, *unlearn* to sell. This means letting go of the “sell something to someone” mind-set so pervasive among product myopic sellers who cannot see the big picture of customer value beyond their products. Instead, the salesperson’s focus must shift — uncompromisingly — to connecting and adding value to client strategy.



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Published by Soundview Executive Book Summaries (ISSN 0747-2196), P.O. Box 1053, Concordville, PA 19331 USA, a division of Concentrated Knowledge Corp. Published monthly. Subscriptions: \$209 per year in the United States, Canada and Mexico, and \$295 to all other countries. Periodicals postage paid at Concordville, Pa., and additional offices.

**Postmaster:** Send address changes to Soundview, P.O. Box 1053, Concordville, PA 19331. Copyright © 2010 by Soundview Executive Book Summaries.

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For sales revenues to lift, selling must end and helping must begin. No doubt, helping a client achieve radically better results often requires a different sales mind-set. You will need to:

- Focus less on how you influence clients and more on how you impact their businesses.
- Shift from competing with other vendors to creating value for your client.
- Concentrate less on making a sale and more on making a difference.

In other words, the mind-set must be on helping the client. This means listening, understanding and, on occasion, telling the customer that change might not be in his or her best interest. It means delivering a new kind of help that is more about expertise and know-how than products and services, a kind of help that touches every facet of a business.

### Strategic Value

All salespeople believe they are strategically valuable to customers. They believe they are already helping. Unfortunately, the evidence proves otherwise, as shown by a landmark survey conducted by MasterCard.

Looking for ways to differentiate itself in a crowded sphere, MasterCard asked more than 1,000 of its key business customers an important question: What value would they like to receive more of from their MasterCard salesperson? In a resounding vote of need, customers requested MasterCard salespeople help in more strategic ways: competitive strategy, strategic thinking, innovation and alignment.

When the final numbers were tabulated, corporate customers rated MasterCard salespeople a paltry 4.1 on a scale of 1 to 10 on their ability to deliver strategic value. In other words, what customers felt was lacking was the ability of MasterCard salespeople to drive the customers' businesses. MasterCard executives asked MasterCard salespeople to rate themselves in the very same category. The salespeople gave their own strategic value-creation abilities a 9.9!

Upon seeing the results, MasterCard leadership realized they had just encountered a new enemy — the distorted belief system of their sales and account management teams.

### Flawed Self-Assessment

Until salespeople understand that they can be an actual barrier to delivering new, more strategic value to customers, the organizations that employ them will never realize their true potential. Salespeople who do not understand how to add strategic value negatively impact

## Raising Sales Productivity

When you gain a seat at the table, sales productivity will rise significantly because of your ability to do the following:

1. **Protect the core:** Customer executives who consider you to be strategically valuable will not let their internal procurement people reduce the relationship to the lowest common denominator — that is, a cheaper price.
2. **Gain access:** When you have earned a seat at the table, you will be able to connect with more senior executives — the ones who can make big-bet, discretionary, risk/reward decisions that affect your offerings.
3. **Create demand:** Creating demand for new products and solutions requires building a case for change with multiple executives and decision makers.
4. **Get the best of both worlds:** When you successfully add value to the strategies of executives, you are able both to protect your core and to sell the new, without having to sacrifice one opportunity for the other.

both the sustainability efforts of their organizations *and* the customers on whom they call. ●

## Velcro Value

You will need to “make like Velcro” to ensure that your complex solutions stick with your customers. Think of the fuzzy Velcro surface that has hundreds of loops representing all of the client strategies — a few big ones along with dozens to hundreds of sub-strategies. The loops represent these many client initiatives and strategies.

The other Velcro surface — the coarse one with the hooks — is your value proposition. A single value proposition adds many, many different types of customer value. It removes a variety of problems, helps different departments in very different ways and enables the accomplishments of multiple strategies. Now, think of each single Velcro hook as representing these many individual value elements.

Your job is to simply bring the two together, making sure the proper “value connections” are made with those people who have an important voice in the decision. When this happens — instant connection!

The more client strategies you can put your value hooks into, the better.

But before you can “make like Velcro,” you’re going

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to have to learn how to align your side with the client's side: how to make the connections in a way that will stick. To do this you need to learn a little bit more about what generates the Velcro surface with all the loops — the fuzzy client strategies.

## New Customer Realities

The real takeaway of the MasterCard research is that today's customer not only needs but also is *actively requesting* a different kind of help. Customers and prospects are looking for the salespeople who call on them to connect and add value to their strategies.

Discovering the drivers of this common need is the first step salespeople must take in becoming strategically valuable and connecting with executives.

Customers, especially senior executives, are under enormous pressure today to deliver on two fronts:

**1. The Province of Productivity**, where senior executives must deliver the quarterly and annual numbers that satisfy all of the stakeholders — not an easy task. Productivity is about generating more with less.

**2. The Domain of Differentiation**, where senior executives must ensure that the enterprise is well positioned for the future — an even more daunting challenge. Differentiation means creating new offerings, entering different markets or devising any new strategy that leads to competitive separation, higher growth and the ultimate reward, premium profit margins.

Productivity and differentiation are the two major executive decision categories that drive scores of sub-decisions within an enterprise. ●

## Bridging the Divide

One cannot under score the difficulty inherent in selling divergent or complex offerings, especially in scenarios where demand must be created. A wonderful vignette on the difficulty of change comes from Machiavelli's *The Prince*:

*There is nothing ... more doubtful of success than an attempt to introduce a new order of things ... The innovator has for enemies all those who derived advantages from the old order of things, while those who expect to benefit by the new order will be but lukewarm defenders. This indifference arises in part from fear of their adversaries ... and partly from the incredulity of established experience.*

In other words, serious change that requires major commitment will necessitate building bridges that take executives beyond mere curiosity and that eliminate the divide between adversaries and supporters of the new order.

We call this process “bridging the divide” — a process that requires salespeople to build a bedrock foundation for change — with change-resistant organizations. To do this requires a sound knowledge of an organization's master strategies and a different FOCAS (*an acronym defined later in this summary*).

## Set Sail

The first step in improving sales effectiveness lies in understanding that “not all sales are created equal.” This is especially true for those faced with selling divergent, complex offerings that customer executives perceive as high reward, but equally high risk. In these cases, demand is best created by attaching the offering to a ship that already set sail — that vessel being customer strategy. ●

## The Great Game of Strategy

Strategy is pretty simple stuff — as long as you have the proper schema to act as a road map. A schema is a mental model that serves as a visual reference point. For example, a blueprint of a new home is a schema. Schemas help you quickly make sense of a complicated situation, essentially helping you reach — in the words of Oliver Wendell Holmes — the simplicity on the other side of complexity.

The schema presented here — The Master Strategic Plan Matrix — is based on two distinct schools of thought about strategy and decision making. The first is

FIGURE 5.1: THE MASTER STRATEGIC PLAN MATRIX

	Important Decisions	Urgent Decisions
Blue Ocean Strategies	I Innovation Decisions	II Implementation Decisions
Red Ocean Strategies	IV Outsourcing Decisions	III Optimization Decisions

*Note: Arrows in the original image indicate a clockwise cycle: I to II, II to III, III to IV, and IV to I.*

the concept of Blue Ocean and Red Ocean strategies, developed by W. Chan Kim and Renée Mauborgne in their popular business book *Blue Ocean Strategy*, a treatise on how to create new forms of customer value. The second is an analysis of the two types of decisions high-

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level executives make almost every day that dictate how they allocate funds: important decisions and urgent decisions. This distinction was made by Geoffrey A. Moore, author of many books on marketing, in his book *Dealing with Darwin*.

### Oceans Two

The first component of the schema is represented by two very large oceans — one red and the other blue. Each ocean represents a different category of strategy, each diametrically opposed.

The Red Ocean strategy is any strategy that supports the “core business” of the enterprise. This is the domain of mature, competitive categories — products, services or markets on which a company has relied for past growth and profits. Unfortunately, competition has gradually swooped in and commoditized offerings that were once new and unique.

A Blue Ocean strategy is any strategy that supports the new products, services or markets that represent higher margins and faster growth. This is the place where the company sees its best opportunities for future growth. The goal in this space is to separate from the competitive herd through significant differentiation.

Moore delineates the decisions that executives make as important decisions and urgent decisions. Important decisions are decisions the executive considers important in the long run. Important decisions are typically about tomorrow, the future. That makes them less “edgy,” or less critical, than urgent decisions, which require immediate attention.

An urgent decision is critical — it must be taken care of immediately. Since every organization must survive today — or there will be no tomorrow — urgent decisions often take precedence over important decisions.

### The Master Strategic Plan Matrix

To understand how senior executives attempt to sustain growth requires classifying decisions into four quadrants. The Master Strategic Plan Matrix helps you visualize how the Blue and Red Oceans overlap with the important and urgent decisions.

The matrix (to be read clockwise from the top left-hand quadrant) is divided into two rows (the two oceans) and two columns (the two types of decisions) that intersect to create four quadrants. The top row of the matrix is Blue Ocean decisions; the bottom row is Red Ocean decisions. The left column is for important decisions; the right column is for urgent decisions.

Based on these elements, the Master Strategic Plan Matrix shows how executives make the risk/reward

decisions that sustain profitable growth.

### The Big Four Decisions

Categorizing organizational spend is a good first step in your quest to better understand client strategy. Next, you’ll need to learn the big four decisions made by all senior executives in their quests to sustain the growth of their companies. The Master Strategic Plan Matrix will help you understand and analyze these decisions.

- **Quadrant I: Innovation Decisions (Blue Ocean, Important).** Decisions in this quadrant revolve around the future; new markets, value or offerings must be created for positive differentiation — the driver of Blue Ocean strategies. The “urgent-less” nature of this quadrant means that these decisions tend to be less of a priority in many organizations.

- **Quadrant II: Implementation Decisions (Blue Ocean, Urgent).** This is the domain of deploying the Blue Ocean strategies that have been created in Quadrant I. New products and services have been created. Now it is time to turn “potential” into “actual.” *Speed* is critical in this quadrant — the organization must move quickly to capture new opportunities.

- **Quadrant III: Optimization Decisions (Red Ocean, Urgent).** In this quadrant, offerings and markets have now matured. Competition has entered the fray, squeezing margins and slowing growth — problems Red Ocean strategies are designed to combat. The primary focus of this quadrant is maintaining the legacy cash cow that still accounts for the largest majority of revenues — urgent dollars that pay the bills and enable the organization to survive for another day.

- **Quadrant IV: Outsourcing Decisions (Red Ocean, Important).** In this final quadrant, leadership must answer the question, “What should we not be doing?” Valuable people and money need to be freed from the Red Ocean and redirected to the Blue Ocean for new differentiation strategies to succeed. ●

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## Connection Mastery

*Prepare, capture and feedback* — this is the cycle required to gain mastery in any complex process, skill or methodology.

### Preparing for the Call

Cheat sheets are a key transformative tool for great preparation. Cheat sheets allow you to prepare for complex opportunities by highlighting critical information that you feel is essential to grasp for an upcoming call. Cheat sheets ultimately enable you to better prepare for

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critical sales calls — no easy task when calling on executives who run complex organizations.

Cheat sheet categories can be many and varied. All vastly improve sales call preparation. They include: sales effectiveness cheat sheets, technical cheat sheets, industry cheat sheets, functional title/department cheat sheets, customer cheat sheets and internal best practices cheat sheets.

### Capturing the Call

Experts recommend that you record important sales calls using capture technology. But, the technology needs to be unobtrusive so as not to inhibit open dialogue with the customer you're calling on. You need to ask for their permission, of course, but rest assured that most clients are open to capture technology for one simple reason — it adds value to their strategy.

### Call Feedback

Once a call is captured, you must actually do something with the recording to ensure that this final step of mastery is accomplished. Make sure you're either self-coaching or using a third-party coach to ensure that you're both maximizing your potential and optimizing each of your valuable selling opportunities.

For savvy sales leaders and managers, this feedback capability is indeed the Holy Grail of sales force effectiveness. Since selective customer conversations conducted in the field can now be immediately assessed with capture technology, the opportunity for quickly coaching salespeople to higher performance is finally possible. This moves training from the classroom to the field — the place of execution where real accountability and change occur. ●

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## Conversations That Connect

Making a connection with a senior executive will require the combination of two important ingredients:

1. **A strategic blueprint:** The Master Strategic Plan Matrix tells you how organizations sustain profitable growth.
2. **A questioning structure:** The FOCAS questioning model enables you to quickly connect to executive strategy.

### Discovery

Gaining an in-depth understanding of the customer does not happen on just one call. Discovery is where the process begins. As such, this makes discovery the most important sales call of all.

Following are the four parts of a discovery:

1. **Approach:** A one- to two-minute high-level overview that gives the prospect some important background information on your company.
2. **Questioning:** A 20-minute to two-hour discussion to learn as much relevant information about the prospect as possible.
3. **Summary:** A quick “Here’s what I heard ...” recap.
4. **Progression:** A recommendation for next steps.

### Approach and Questioning

In the approach, you will cover two important pieces of information: what you do and the purpose of your call. “What you do” is your strategic positioning statement — something with which you probably grapple. This is the statement spoken in simple language that helps the customer understand what you do best. The important point here is to not describe your company as a “product” company, a very easy and common mistake. Remember, you are in the *results* business — high-impact results — and if you don't communicate this quickly to a senior executive you immediately risk misalignment and loss of interest.

### FOCAS

The next step — and the most important part of the discovery — is the questioning process. To help you, here is how to FOCAS.

FOCAS is an acronym with each letter signifying a type of question. Each type of question is unique in its intent and function. Broken into its components, the FOCAS questioning model is as follows:

- Fact Questions.
- Objective Questions.
- Concern Questions.
- Anchor Questions.
- Solution Questions.

The FOCAS model allows you to transcend negative pain-based questioning, helping you learn what an organization is *attempting to create*. This dialogue is much more positive in tone, and it will generate valuable information to help you build your case for change. ●

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## FOCAS on Customer Strategy

FOCAS is a questioning structure that leads to very dynamic customer conversations. What keeps FOCAS on track is its strategic intent — to uncover strategy, objectives and challenges of the customer in a systemic

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way. This strategy is the glue that keeps the conversation coming back to common ground, and keeps your queries high payoff for both parties.

## Fact Questions

Fact Questions are the easiest type of questions in the FOCAS model. Fact Questions are used to collect data, facts and information about the buyer's *current* situation. Here are two examples of common Fact Questions:

- Could you give me a little more background on this division?
- In which markets do you generate most of your revenue?

Fact Questions are necessary to capture vital information that you are unable to acquire through pre-call research. However, they are also low-payoff questions for both buyer and seller. You need to limit the number of Fact Questions you ask, spending five to 10 minutes on them at most, and move quickly to questions that you and the buyer find more meaningful.

## Objective Questions

Objective Questions are questions used to identify and investigate the buyer's objectives.

Objective Questions are critical to helping you understand the master strategic plan of the customer, the driving goal of the questioning process. Once you learn this plan, you can drill down into each quadrant, uncovering which objectives are most critical from both a differentiation (Blue Ocean) and a productivity (Red Ocean) perspective. The following are examples of Objective Questions:

- How do you see the organization needing to change over the next few years to retain its competitive edge?
- Where do you see your best future opportunities for profitable growth?

Once you feel you've learned the critical goals that relate to this organization and individual, it is time to move on. ●

## FOCAS on Building a Case for Change

Now it's time to turn our attention to Concern, Anchor and Solution questions.

### Concern Questions

Concern Questions explore the dissatisfaction, difficulties, concerns and problems that the executive or prospect may be experiencing. Therefore, the strategic intent of Concern Questions is to find buyer dissatisfac-

## What Customers Want

Here are three things to keep in mind:

- Customers want help — just a different kind of help.
- Customers want *their* businesses to become more productive and differentiated.
- Customers want to conceive of different products, capture different markets and create new forms of value for their customers.

tion — especially strategic discontent.

Following are two examples of Concern Questions:

- Could you share with me some of the more interesting challenges you are facing in the accomplishment of your core strategies?
- Have you had any issues with losing market share to overseas competition?

Concern Questions serve as an excellent foundation on which to build a case for change for your solutions.

### Anchor Questions

Anchor Questions explore the seriousness of problems already identified. Anchor Questions are designed to broaden the discussion of these issues, helping an executive see that narrow problems often have systemic consequences. For this reason, Anchor Questions are extremely high payoff because they help executives see the broader — or enterprise — implications of a problem.

Examples of Anchor Questions include:

- Do you feel that your bottlenecking problem is affecting your reputation in the market?
- How is that void in hiring quality people affecting your ability to make faster inroads into the new market?

Anchor Questions resonate because they represent the reasoning process of an executive.

### Solution Questions

Finally, the last questions in the FOCAS model are Solution Questions. Solution Questions are unique in that they develop the executive's recognition of the value or usefulness of your solution. Unlike Concern or Anchor questions, they do not explore dissatisfaction areas. Rather, these are value-focused questions that help you understand the interest level of an executive in potential solutions.

Following are two examples of Solution Questions:

- In what ways might it help your organization to solve that bottleneck issue?

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- How would it help you if we could free up valuable resources in that area?

Solution Questions help you learn whether the executive sees value in the removal of problems. Solution Questions get the buyer to think about potential solutions and determine whether or not their problems or dissatisfactions are serious enough to justify action.

They also help the buyer see your potential role in the achievement of their objectives and opportunities and help you get feedback on the value of helping in important strategic areas. ●

### On the Same Side of the Table

Good strategy is always based on sound objectives, so let's start by examining some important goals you'll want to ideally accomplish on this next visit:

1. **The case for change:** You need to demonstrate that change might be in the best interest of the client — at least worthy of further investigation.
2. **Same side of the table:** At some point during this second meeting, those in attendance must begin seeing you as a consultant.
3. **Shock absorber:** You need a shock absorber mechanism between *needs analysis* (the discovery call) and your eventual *specific proposal* (in the future).
4. **Conceptual agreement:** The sooner you can conceptually agree on direction, the better.

Ultimately, you want to paint a vision for the prospect — a powerful vision that adds significant value to their current strategy. This happens *after* you've demonstrated that you understand their objectives and constraints, but *before* showing ideas and options. In other words, a vision is only introduced after one has *connected to strategy*.

### General Recommendations

The General Recommendations tool will enable you to connect to customer strategy, build a case for change and achieve your other goals for this second meeting. The purpose of this tool is to establish a business argument that change is in the customer's best interest. Done properly, this mechanism not only accomplishes this goal but also offers a range of options for how to move forward at appropriate — but varying — risk levels.

General Recommendations are presented in a document that you will walk through with the buyer, page by page. This can be done in a visual presentation format for a larger group, but since your second meeting will usually have only a handful of individuals, a paper document is more appropriate. The process of delivering the document is critical and the delivery should become a disciplined skill.

A General Recommendations document consists of five parts:

1. **Situation Summary.** This first section contains factual information learned via your Fact Questions during the discovery.
2. **Goals and Objectives.** This portion of the document ideally captures the critical objectives of the enterprise at two levels: organizational and departmental.
3. **Constraints, Issues and Challenges.** This section reveals the problems — and the systemic consequences of those problems — originally uncovered in your discovery visit.
4. **Vision.** This should be a fairly simple but powerful depiction of the better future you are espousing for this particular client.
5. **Options.** By offering fundamentally different types of value at this point, you can better — and more quickly — determine the true quality of this opportunity.

### No Closing

Encourage the group to talk things through before they make a decision. In other words, please do not implode your entire effort by attempting to close on one or all of the options. Slow down the process by encouraging the key decision base to discuss your suggestions to determine the best course of action. Then simply agree on a date in the (near) future when they can give you commitment or direction. ●

### Difference Maker

When executives who lead companies say that you really made a big impact, they are indirectly telling you that you have gained a seat at their table. This table is reserved for those special *businesspeople* who have made a profound impact on both the executives' personnel and their enterprises.

When you help a client achieve a differentiated position, you will be viewed as a change agent, a strategic consultant or a client adviser. Not only will you be sought out, you will also stand out. *An investment.* You will be seen as a difference maker. ●

#### RECOMMENDED READING LIST

If you liked *A Seat at the Table*, you'll also like:

1. **Exceptional Selling by Jeff Thull.** Focuses on how to use powerful diagnostic principles to reframe the typical sales conversation.
2. **The Giants of Sales by Tom Sant.** Learn four time-tested approaches to successful selling from the four greatest sales pioneers of the 20th century.
3. **The Ultimate Sales Machine by Chet Holmes.** Provides 12 key strategies to turn any business into the ultimate sales machine.