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WHITEPAPER

6 Strategies for Hybrid Selling Success



It's no secret that virtual selling has been crucial to businesses surviving the pandemic. In the past B.C. era (Before COVID), a virtual sales call was probably a Plan B when the client couldn't meet in person. Now, in the post-pandemic environment, the **hybrid salesperson** – someone who can control the meeting and close the deal in both virtual and in-person settings – is the **future of selling**.

You are probably reading this because you understand the inherent challenges of hybrid selling such as:

- Too many **distractions** for the presenter and the attendees
- **Technology fatigue** for the participants
- Difficulty picking up **body language** of the key players
- Inability to conduct an **effective demo** or site tour
- Challenges of some parties communicating **live** and others **remotely**

As a global sales training organization, Sandler has curated **six highly effective strategies** to overcome these challenges for **hybrid selling success**. The goal is to help you combine the best of both worlds, emulating the in-person experience as much as possible while delivering a flawless and visually captivating presentation for remote attendees as well.

Sales Strategies in Synchronous Settings

Synchronous is just a fancy word that means **live or real time**. Think Zoom, Microsoft Teams, Google Meet or similar online platforms where virtual meetings can take place.

There are several advantages to making a sales presentation in this format:

- There's more **interaction** across groups or teams who are participating in the meeting, so you can hear feedback and questions in real time. You can seize this opportunity to showcase your personality and your product knowledge and provide answers immediately without a lot of back-and-forth emails that can quickly overwhelm the customer's inbox.
- Many presenters have commented that virtual meetings are an **equalizer** for the introverts and extroverts in the room. The introverts tend to open up more, and the extroverts refrain from taking over the meeting and monopolizing the conversation.
- A huge plus to the synchronous sales setting is the ability to access your notes or important documents at a moment's notice (more on this coming up!). You can even put sticky notes on the edge of your laptop with reminders of selling points to include in the presentation or in your closing remarks. You'll look **poised, polished and professional** from start to finish!

Making the First Five Minutes Count Setting The Stage and Roadblock Removal

We are going to assume that you have mastered the basics of setup for a virtual presentation including camera placement, lighting, background, microphone and web conferencing functionality. There are no excuses anymore for being late to start the meeting or blaming the technology for those awkward can-you-hear-me moments.

The Up-Front Contract (UFC) is a Sandler technique to avoid pitfalls that can damage a sales call by addressing them up front before they happen. Using a UFC allows the sales professional to set the agenda for the call, set expectations for participation from each side, and state the desired outcome or decision to be made by the end of the meeting.

Another key benefit of using a UFC is **roadblock removal** and maintaining control of the selling process even if things do not go as planned. Unwelcome surprises can compromise a positive relationship between you and your prospective client. After the welcome and introductions are completed, remind the participants that the meeting is live and that things might not be 100% smooth. You might want to address interruptions, technology glitches, or anything else that could go wrong in your hybrid sales call. If you let everyone know up front, they'll be much more understanding about it if anything should pop up. Best of all, everyone can relax and get on with the business at hand now that there is a backup plan to address any issues that arise.

Sales Strategies For Synchronous Settings

Strategy 1

The Floating Deck

During every sales presentation, there are times when you will want to show a diagram, a chart, a graph or an image of some sort to drive home the point you are making. The Floating Deck is, in essence, **a handy reference library** of pertinent content to grab on the fly and pop on the screen when it fits into the presentation. Think of it as a digital version of one-page sell sheets that you only use when necessary.

Sandler recommends asking for permission before launching into a presentation. You might ask, “Is it OK if I show you an image to illustrate this point?” and then share your screen with just that one slide showing. When you are finished making your point, stop sharing your screen and go back to your face on the screen.

By using a Floating Deck, you are relying on your sales skills and the prospect’s interests to guide the presentation, not a canned PowerPoint. This strategy keeps everyone’s focus on what is important to **moving the sale forward**, not what’s on the next slide.



Strategy 2

Whiteboard

The Whiteboard features of a virtual presentation function exactly like the flip chart during an in-person meeting. Why is this strategy so effective? Because studies have shown that the best communication occurs through **sight, sound and touch**, but most sales presentations are solely auditory. Using a Whiteboard allows you and your prospects to absorb and process more information. To do this, simply tell the participants that you want to take a few notes of everyone's remarks so the entire group can refer to them. Then you pull up a clean slide on your screen and, using a digital pen or annotation tool, you write on the screen just as you would with a marker on a flip chart. The Whiteboard can separate you from your competition while clarifying the communication and facilitating better outcomes. You can also use a shared collaborative document like a Google Doc, Evernote, or Dropbox Paper so all participants can take notes together. The result is a co-created solution that will impress your prospects and elevate your conversation exponentially.



There are a number of vendors that offer digital annotation and collaboration tools, so select one that is compatible with both your organization and the prospect's technological skills and abilities.

Strategy 3

In and Out of Screen Share

This strategy is referenced above in the Floating Deck, because it's the process of going seamlessly back and forth between **your presence on the screen** and **the images that support your presentation**.

Practice getting comfortable with sharing your screen when you need to demonstrate an example or pull up the perfect image, but then cut back to your video when the image on the screen is no longer relevant to the presentation.

Also, on some meeting platforms sharing your screen will hide or dramatically shrink the participant's videos, losing body language and other valuable feedback. The bottom line is, you should always strive to **transition back to a dialogue** with the buyer.

At Sandler, we believe that the PowerPoint should **aid** the communication, not **be** the communication. If you can master sharing and not sharing your screen throughout the sales presentation, you will look like the experienced sales pro that you are. You and your presentation will come across as friendly and engaging by only showing information necessary to move the sale forward!

Sales Strategies For Asynchronous Settings

Asynchronous simply means “**not at the same time.**” This refers to selling through tools like emails, recorded video, direct messages, and the like. These technological methods of communication have become very popular and are often misused by salespeople.

Top hybrid salespeople leverage their asynchronous communication to enable better meetings, reach more buyers, and shorten their sales cycle. Because COVID dramatically changed the way people are working and communicating, the use of **prerecorded video** has spiked in both sales and marketing. Sandler has partnered with Vidyard, a leader in the sales video messaging space, to help us collect and share best practices for video selling.

There are many benefits to sending a prerecorded video, such as:

- ▶ Videos have a **longer shelf life**; they can be viewed multiple times
- ▶ Videos are **easily shared** among teams
- ▶ Videos are **ideal for short messages** of about two minutes
- ▶ Videos allow you to **start the engagement** and bonding process prior to the meeting

Once you get the hang of recording a video, you'll quickly discover that it's often easier than composing an email. The cool thing is that it looks impressive, so your buyers will give you extra credit for your creativity and ingenuity.

These following strategies can also be used with emails and other text or direct messages.

Strategy 1

The Pre-Meeting Message

A great way to get the attention of your attendees and differentiate your meeting from the typical sales call is to send your **Up-Front Contract** via email containing a short video introducing yourself and reminding everyone of the agenda for the upcoming meeting. The video **sets the expectations** for the call and helps to ensure that participants arrive prepared and committed to the desired outcome. Also, if you have multiple decision-makers coming to the presentation, some of whom you haven't met, you can **establish an immediate rapport** in advance with your video.

Strategy 2

The Post-Meeting Recap

Showcase your ability to **follow up and follow through** by sending everyone a video that recaps the meeting in a succinct summary. Often, meetings result in next steps, and it is important to clarify what was agreed to and the dates and actions that need to be taken. When they're back at their desks or homes and checking email, buyers appreciate a video that quickly sums up the meeting. It can also be shared easily with other parties who may need to take action, but who were not present in the meeting!

Strategy 3

The Missing Persons Message

Did some key decision-makers or stakeholders miss your meeting? Don't rely on the other attendees to share the content as compellingly or as completely as you would have wanted. You can send a video that summarizes your main points for the missing persons, so they can hear the information straight from you. This way, you stay in **total control of the message**.



There are several software providers that offer video messaging platforms to enhance your sales skill set, but Sandler recommends Vidyard. [Get a free trial here.](#)

Finally, if one of your videos was particularly effective at closing a sale, be a hero and share it with others on your team so you can create a **playbook of templates** that work! Collecting and sharing best practices is the fastest way to help everyone in your organization sell more and sell more easily.

In Conclusion

Here at Sandler, we think this is the best time to be in sales. Thanks to companies worldwide embracing the benefits of both virtual and inperson selling, you can get more people together for more impactful and profitable sales presentations, and still enjoy a more rewarding work/life balance with less travel time required. That's a win-win by any definition, especially if you become proficient at these six strategies for hybrid selling success.



If you want to learn more about how Sandler has teamed up with world-class sales readiness and sales enablement technologies to support your revenue-generating teams, contact a Sandler Trainer today!

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