

User Engagement – Selling your equipment and services

Bioimaging UK Meeting, 30th September 2024

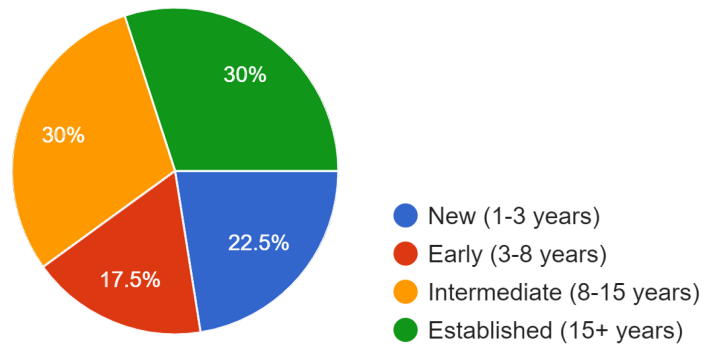
Helena Coker, PhD. Advanced Microscopy Manager; O-ZCoE, KIR and IDRM, Oxford

James Bancroft, PhD. Cellular Imaging Core Facility Lead; Centre for Human Genetics, Oxford

Pre-meeting questionnaire

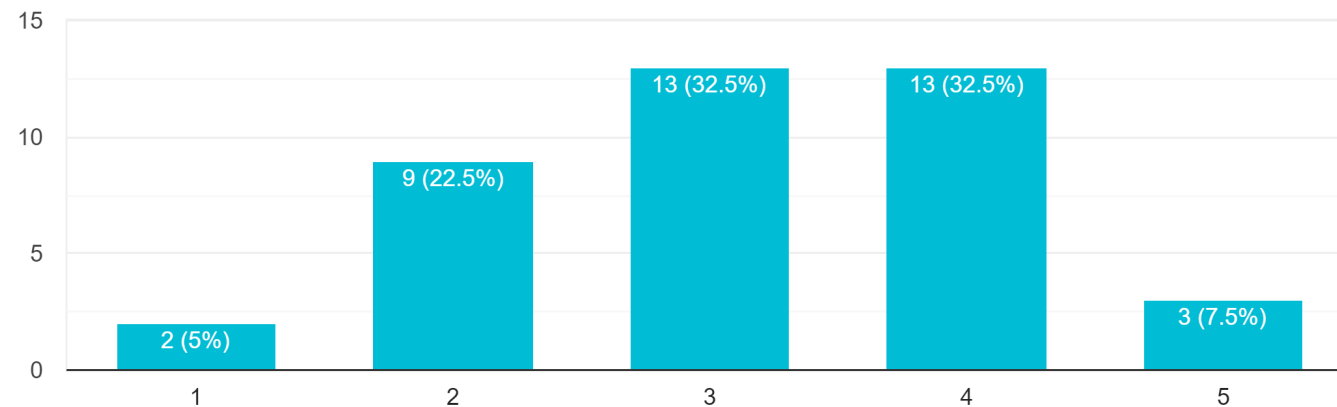
At which stage of your career are you currently?

40 responses



On a scale of 1 to 5, how important are sales skills in your current role?

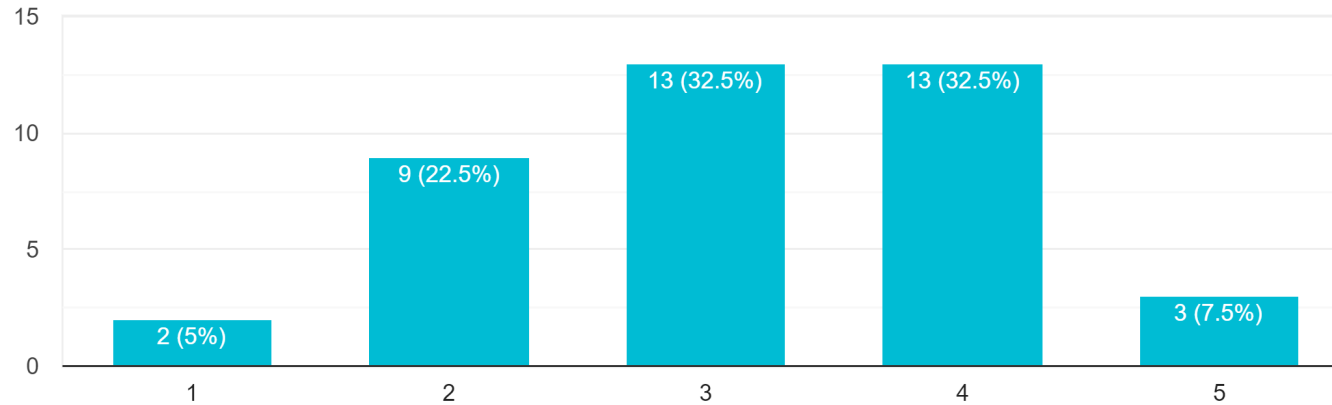
40 responses



Pre-meeting questionnaire

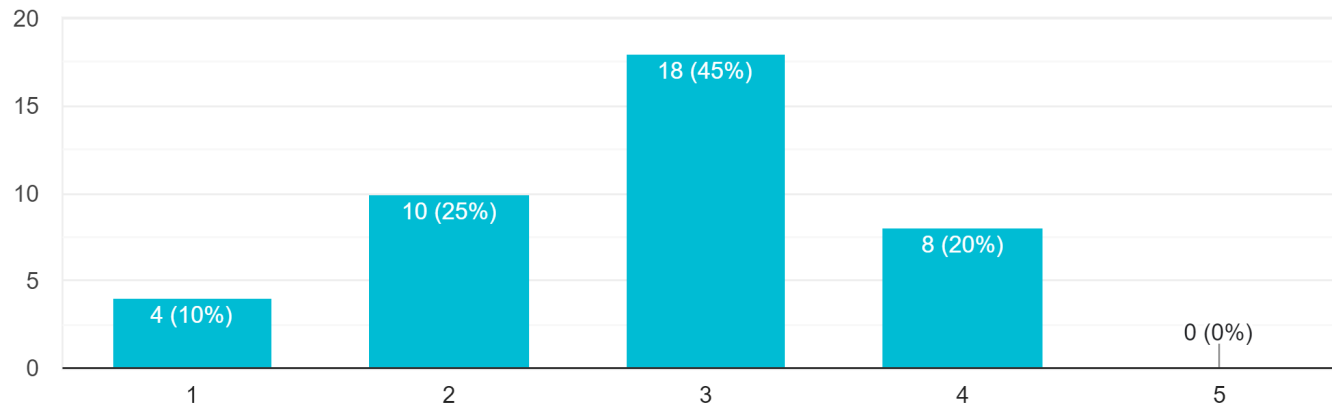
On a scale of 1 to 5, how important are sales skills in your current role?

40 responses



How confident do you feel about the sales aspects of your job?

40 responses



Pre-meeting questionnaire

- ▶ If you don't feel fully confident about the sales aspects of your job, what factors contribute to this lack of confidence?

Lack of confidence...

in particular technology
in ability
in authority

Not wanting to overpromise

Lack of experience

Lack of training

New to the idea/role

Understaffed so
don't have the time

Not many external users

Miss match between
technical expertise
and biological
expertise

I don't do sales

I don't want to do sales

I don't enjoy it

Purpose

- ▶ The aim of this workshop is to build your confidence and skill in ‘selling’ your equipment or services to your users.
- ▶ You may not have noticed the sales skills you use on a daily basis, so we will be highlighting key transferable skills in leadership and communication.
- ▶ Key outcomes we are hoping for
 - ▶ Concepts; selling as a leadership style, sales styles,
 - ▶ Skills: active listening, open questions, finding your sales style
 - ▶ Thinking points; credibility statements, confidence, CPD intentions and upskilling options – for yourself and/or your staff
 - ▶ Discussion/feedback on the value of this type of workshop for the Network

Overview

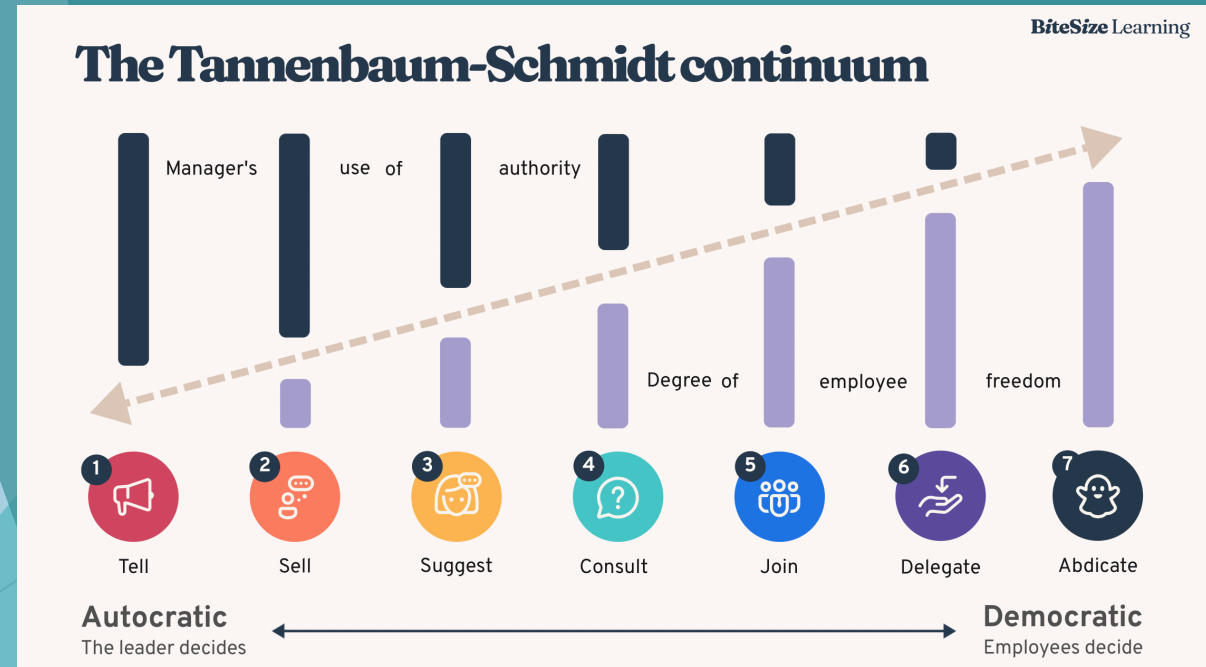
- ▶ **Introduction**
- ▶ **Building trust**
- ▶ **Building confidence pt. 1**
- ▶ **10 minute break**
- ▶ **Building confidence pt. 2**
- ▶ **Showcasing your equipment/service**
- ▶ **Managing challenging customers**
- ▶ **Round up**
- ▶ **Feedback**

Introduction

- ▶ The role/remit of your facility. This is a long game. Perhaps you are:
 - ▶ encouraging users/PIs to invest in equipment
 - ▶ Asking them to try a different microscope/technique
 - ▶ Persuade them to know theory rather than push buttons
- ▶ Meanwhile, in a stereotypical sales scenario – responsibility ends at point of sale
- ▶ More parallels with industry aftercare and applications specialists
 - ▶ Ongoing service provision
- ▶ More parallels with business that you might have thought
 - ▶ KPIs and business development

Selling as a leadership style

- ▶ ‘Selling’ is a leadership style on the **Tannenbaum Schmidt continuum**
 - ▶ directly relies on your influence as a manager to affect the decisions or actions of people who have less experience or expertise than you
- ▶ The leadership style **has to** change as users’ experience increases
- ▶ You should often question ‘**what am I trying to achieve in this case?**’



**1**

Hard Worker

- Always goes the extra mile
- Self-motivated
- Interested in feedback and development

**2**

Challenger

- Always has a different view of the world
- Understands the customer's business
- Loves to debate
- Pushes the customer

**3**

Relationship Builder

- Builds strong customer advocates
- Generous in giving time to help others
- Gets along with everyone

**4**

Lone Wolf

- Follows own instincts
- Self-assured
- Independent

**5**

Problem Solver

- Reliably responds
- Ensures that all problems are solved
- Detail-oriented

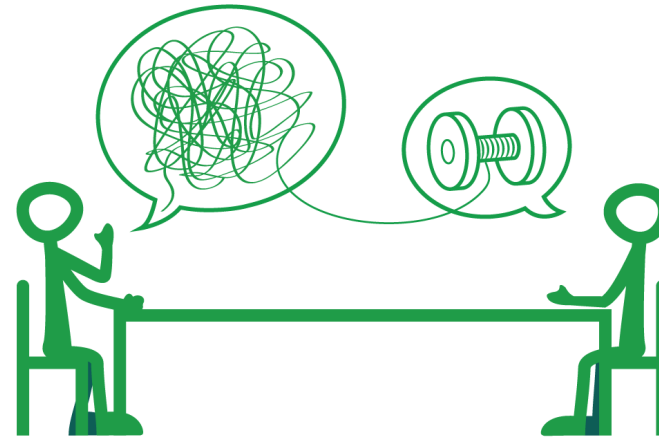
Sales styles

<https://www.gartner.com/smarterwithgartner/power-challenger-sales-model>

Building Trust - Communication

- ▶ Active listening
- ▶ Open questions
- ▶ Homework – yours and theirs
- ▶ Allies; your team, other users
- ▶ Be comfortable being ignorant
- ▶ **Trust is the main component of ongoing ‘customer’ relationships in facility and industry.**

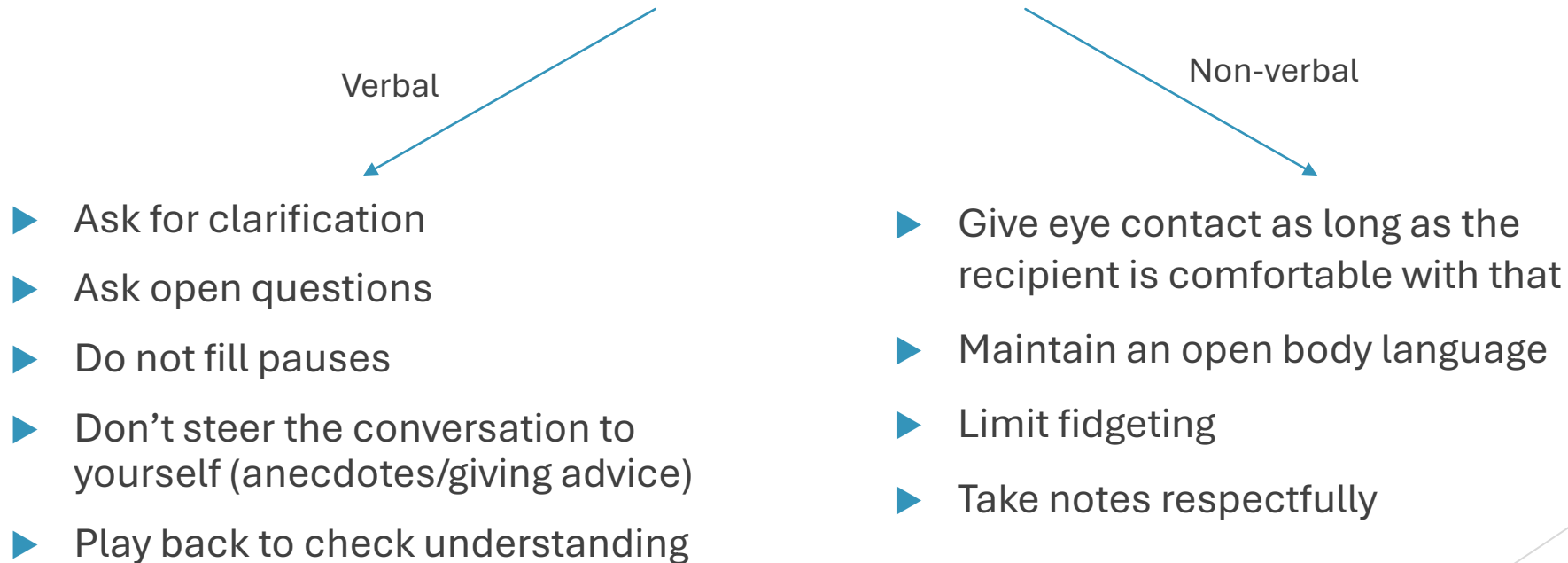
Coaching



Active Listening

- ▶ Active listening is the practice of preparing to listen, observing what verbal and non-verbal messages are being sent, and then providing appropriate feedback to show attentiveness to the message being presented.

Verbal



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graph TD; A[Active listening is the practice of preparing to listen, observing what verbal and non-verbal messages are being sent, and then providing appropriate feedback to show attentiveness to the message being presented.] --> B[Verbal]; A --> C[Non-verbal]; B --> D[Ask for clarification]; B --> E[Ask open questions]; B --> F[Do not fill pauses]; B --> G[Don't steer the conversation to yourself (anecdotes/giving advice)]; B --> H[Play back to check understanding]; C --> I[Give eye contact as long as the recipient is comfortable with that]; C --> J[Maintain an open body language]; C --> K[Limit fidgeting]; C --> L[Take notes respectfully];
```

- ▶ Ask for clarification
- ▶ Ask open questions
- ▶ Do not fill pauses
- ▶ Don't steer the conversation to yourself (anecdotes/giving advice)
- ▶ Play back to check understanding

Non-verbal

- ▶ Give eye contact as long as the recipient is comfortable with that
- ▶ Maintain an open body language
- ▶ Limit fidgeting
- ▶ Take notes respectfully

Open Questions

- ▶ Questions which are non-judgemental and encourage someone to think and elaborate.
- ▶ Do not have discrete answers – yes/no etc.
- ▶ Gives space to challenge preconceptions

- ▶ Useful when trying to get someone to describe their project/ aims so that you can make some informed suggestions about techniques/instruments/training.

- ▶ Do you know which magnification you need?
 - ▶ What kinds of structures you want to see in the image and how will you analyse them?
- ▶ How much microscopy have you done in the past?
 - ▶ Could you tell me a bit about your prior experience in microscopy? What did you find difficult in the past?



Stay curious
a little bit
longer

Activity 1: Open Questions (10+5 min)

- ▶ Scenario (or pick your own): You get an email from a user and you ask for a meeting
‘I would like to do some imaging to look at the dynamics of CD62+ endosomal structures containing anti-microbial fragments and phagosomes containing bacteria....’
- ▶ As a group prepare leading questions with at least one example of:
 - ▶ where you would ask for clarification
 - ▶ where you would plead ignorance
- ▶ Nominate one person to be the user and others interject with the questions and statements. Can you fit in a few of the other active listening components?
- ▶ 5 minutes, group feedback and example questions

Building Confidence

▶ Upskilling

- ▶ Schedule time to practice – links to doing your homework from previous section
- ▶ Courses
- ▶ Qualifications; national registration schemes
- ▶ Shadowing and mentoring schemes

▶ Credibility statements

- ▶ Practiced ways of introducing yourself which cements your authority/experience on a topic (without being egotistical).
 - ▶ Particularly useful where you might not have (academic) seniority.
 - ▶ Another aspect of building trust
 - ▶ **Gives power to experience and not just qualifications which can be important in an academic setting**

Activity 2: Credibility Statements pt. 1 (5 min)

- ▶ Think about the area/instrument you are **least confident in**.
- ▶ Write one or two sentences which you could say to a user to introduce yourself and why they should respect you as authority/expert in this area.
- ▶ Then do the same thing for the technique/area/instrument you are **most confident in**.
- ▶ 10 minute break
- ▶ **Please return to a different table after the break**

Activity 2: Credibility Statements pt. 2 (10 min)

- ▶ Hopefully you're with some new people
- ▶ Introduce yourself to your table with the first credibility statement.
- ▶ Continue around the table until everyone has introduced themselves.
- ▶ On a second pass around the table deliver your second statement.
- ▶ Does your group notice any differences?
- ▶ How might you bring that to the aspects you are less confident in?

Showcasing your equipment/services

- ▶ You've persuaded someone they should trust you when you suggest an instrument or analysis. Now you need to show them... this can feel like a pressure and a performance.
 - ▶ This is the practical portion of your 'sale'
- ▶ Practice in advance - even with their samples
- ▶ Have good test or back up samples
- ▶ Demo as a duo if you have capacity. This can help with the pressure of any troubleshooting you might need to do.

Activity 3: Set an intention (5 min)

- ▶ Personal exercise: identify one or more areas where you might not have lots of experience or examples.
- ▶ Define how you will go about getting more experience, where will you find the time, where will you find the samples.
- ▶ Share with someone on your table to cement the action.

Managing Challenging Users/Applications

- ▶ Being a Challenger without being a stereotypical salesperson
- ▶ Challenger sales methodology
 - ▶ Come up with new ideas based on their product's/service's USP
 - ▶ Adapt their interactions based on customer's needs and values
 - ▶ They take control of the sale
- ▶ Different kinds of challenge; know-it-all, not-engaged, un-sure etc.
- ▶ Translation in both directions - specifications vs. biology

Tools and tips for managing Challenging Users/Applications

- ▶ TAB (topic agenda benefit) model for managing expectations.
- ▶ Understand personalities (upskilling, strengths or personality styles course?)
- ▶ Tension is okay and is a tool – golden silence.
- ▶ Ask to come back to them at a different time if not possible to manage in the moment

Activity 4: being a Challenger (10min)

- ▶ **User: 'I want to do it this way because this is what my group does.'**
 - ▶ **Assay many dividing cells for changes in timings. Have said they want to use point scanning confocal because their group/PI told them that.**
- ▶ As a group mind mapping situations and phrases/strategies to challenge the statement above.
- ▶ Give some examples of hard sell or aggressive/negative challenges (advice giving) and some examples of more positive options.
- ▶ How would your statements change if addressing a PI rather than a user?
- ▶ 5 minute group feedback

Round up: The Big Picture

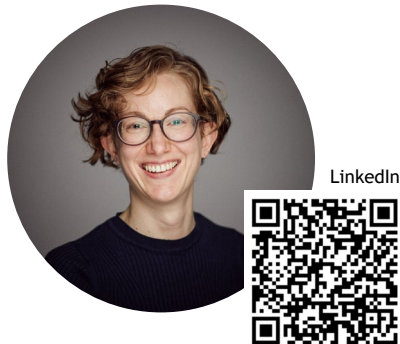
- ▶ This focused on getting users who already know about you to engage.
 - ▶ Think about how this would be different for prospecting.
- ▶ ‘Selling’ is not just something you have to do with users; you need PIs to ask for the right funding in their grant applications, you need the department to value and justify your position, you may need to justify budgets and spending.
- ▶ Remember to ask yourself, **‘what am I trying to achieve?’**
 - ▶ what strategy/tools might you need for that?
 - ▶ how confident do you feel? what do you need to do to gain more confidence.
- ▶ Reminder that the key is listening and open communication.

The Long Game

- ▶ Remember it's a long game
- ▶ Some suggestions for ensuring continuing engagement:
 - ▶ Bring a friend – if you're doing a training/ having a chat on a topic can the user suggest someone else who might be interested?
 - ▶ User group meetings
 - ▶ Videos and useful resources
 - ▶ Social media
 - ▶ REF/hidden REF
 - ▶ 6 month fall off check in
- ▶ When will you feel like you've achieved the 'sale'?

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Helena Coker, PhD
helena.coker@kennedy.ox.ac.uk



James Bancroft, PhD
james.bancroft@well.ox.ac.uk

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Feedback

- ▶ Was this valuable?
- ▶ One thing you will take away
- ▶ One thing you want to know more about
- ▶ Suggestions/comments (optional)
- ▶ Further open text feedback (optional)