



## “The Fourth R” - Research

“The real key to successful selling is finding out what people do. If you understand what they do, how they do it, when they do it, where they do it, who they do it with, why they’ve chosen to do it that way, and whether your product could help them to do it better, you’re going to be successful.”

– Stephan Schiffman, *Cold Calling Techniques*,  
Holbrook MA: Adams Media Corp., 1999

Historically, students of business and sales are taught that success comes from mastering the traditional “Three Rs” of reading, writing, and arithmetic. If you learn to communicate effectively, write a good proposal, understand a financial spreadsheet, and manage a realistic budget, the chances are good you’ll succeed in business.

In today’s value-oriented business marketplace, the “Fourth R” — research — is the tool that truly differentiates one business from the next and one salesperson from the next. You need to understand the value of Sales Intelligence and how to quickly and ethically conduct research if you’re going to effectively practice the Platinum Rule.

The “Fourth R” separates the traditional salesperson or account manager — who uses a cookie-cutter approach to serving client needs and thus consistently competes on lowest price — from today’s successful client-centric, Sales Intelligence-based salesperson or manager who knows how to find relevant, credible, and objective information and apply it in ways that solve client problems in unique ways.

**SAM TIP** 

Good salespeople ask probing questions to learn what interests their prospects. A great salesperson has practiced the “Fourth R” – research – and already knows what the prospect cares about before walking in the door.

For most companies, the marketing and sales departments’ performance determines the bottom line. Let’s look a bit deeper at the value of research in sales by using a hypothetical case study.

Assume two companies are going to make a sales call to the VP of Marketing for a medium-sized financial institution. Both salespeople are selling a proprietary version of Customer Relationship Management (CRM) software. Both CRM systems have similar features, price points, and both companies are respected in the CRM space. Because the VP of Marketing has Buyer Intelligence, in the mind of the VP, when comparing the two companies, CRM software is a commodity.

Salesperson One meets with the VP and immediately launches into his PowerPoint presentation. He adeptly shows off his CRM system’s bells and whistles and closes with a detailed listing of optional components price options. He leaves the VP a generic chart comparing the cost of the CRM system with the return on investment the VP could expect.

By all accounts, Salesperson One has done a nice job. He showed why his CRM system is different, offered a variety of price options, and produced a general analysis on how purchasing his CRM system will ultimately increase profits.

However, Salesperson One failed to provide his client any value; he did not differentiate his CRM company from competitors, and as a salesperson, he did nothing to differentiate himself from the next salesperson. He didn’t show how his CRM system could solve his prospect’s unique issues because he had little information on the prospect and what issues the VP is most likely facing. Instead of customizing his presentation, Salesperson One did a standard presentation, the same one he’s given to hundreds of prospects. In the mind of the VP, Salesperson One and his CRM is still a commodity.

Salesperson Two practices Sales Intelligence and has embedded the Platinum Rule into her sales process. She meets with the VP and before even turning on her laptop, mentions that she really liked the recent article in the *Business Journal* featuring a profile of the VP. She was most impressed that he not only led a division of a large company, but that he had time to coach his daughter’s soccer team and he was leader of

his son's Boy Scout troop. She remarked that his time spent with family is impressive considering that the VP's company is doing 12 percent quarter over quarter growth, while the industry average is only 3 percent.

After additional small talk, Salesperson Two starts her official presentation. Instead of just showing her CRM system's features, she shares the benefits of her system and how it will directly impact the VP's business. They discuss how the flexibility of the CRM system is perfect for the VP who is looking to expand his sales force in the southeast. They discuss how the CRM system will seamlessly integrate into the VP's back office accounting package. She demos how her CRM system will work with the VP's largest client. At the end of the presentation, she discusses how her system can directly increase the VP's return on investment, and her charts use examples of how different divisions within the VP's company will use the system.

Salesperson Two used information to provide value; she practiced the "Fourth R." She researched and read articles about the company. She searched databases and found information on competitors and customers. She used proprietary content sources from her local library to search for additional information on the company's divisions and leaders. Salesperson Two differentiated herself from the competition.

At the end of the day, people still buy from people. When faced with two similar firms with two similar products priced approximately the same, the VP will choose Salesperson Two. She did her homework, she made the VP feel important, and she provided value beyond what one would expect from a CRM software vendor. Salesperson Two showed how her product could solve the VP's unique issues. She got in the door and closed the deal by making exceptional use of Sales Intelligence and the "Fourth R."

Talk with anyone who is an expert at influencing people, from a minister to a politician to a great salesperson, and they all practice the "Fourth R." If you understand what interests the people you meet with, if you know what they genuinely care about, you can ask relevant questions and engage people to share what they most likely don't share with others.

In *How to Win Friends and Influence People*, Dale Carnegie shares a story about President Theodore Roosevelt and his adherence to practicing the “Fourth R” prior to meeting with people. Carnegie writes about Roosevelt:

*Everyone who was ever a guest of Theodore Roosevelt was astonished at the range and diversity of his knowledge. Whether his visitor was a cowboy or a Rough Rider, a New York politician or a diplomat, Roosevelt knew what to say. And how was it done? The answer was simple. Whenever Roosevelt expected a visitor, he sat up late the night before, reading up on the subject in which he knew his guest was particularly interested. For Roosevelt knew, as all leaders know, that the royal road to a person’s heart is to talk about things he or she treasures most.*

If the president of the United States can practice the “Fourth R,” you certainly can. If you say that you don’t have the time to conduct research on your prospects, I would challenge you to look at your daily calendar and imagine comparing it to the calendar of Roosevelt. The question you need to ask yourself is “do you want to be good at what you do, or do you want to be known as one of the best?”

Sales Intelligence through the “Fourth R,” when applied correctly, is incredibly powerful. In a sense, the “Fourth R” can act as a crystal ball into the mind of your prospect and provide accurate insight into the core issues they most likely are facing. This crystal ball ensures that your conversation, and your offering, is relevant to your prospect’s needs and it helps you craft engaging questions.

Companies spend tens of thousands of dollars sending salespeople to training seminars designed to teach how to ask better questions. The “Fourth R” is the complimentary “silver bullet” to any sales technique where the key success component is asking questions so the prospect shares key issues. Why? Because the “Fourth R” takes the guesswork out of knowing what kinds of questions you should ask.

Instead of generic questions, the “Fourth R” helps you tailor questions and establish your credibility in ways that are more likely to solicit a response. By having an informed understanding of the issues your prospect is most likely facing before you begin a meeting, you are able to ask relevant questions that are more likely to generate a meaningful response.

Imagine the dialogue you could engage in if you knew your prospect’s annual revenue growth, the trends in your prospect’s industry, how your prospect’s competitors were performing, new products your prospect or its competitors were introducing into the marketplace, and even how your prospect’s customers were doing and the issues they were facing.

When you’re armed with relevant data, you’re able to not only ask better questions, but you also massively increase your credibility. Remember, people buy from people. People buy from people they trust. And people trust people who can intelligently engage in dialogue that is relevant.

Asking a generic question like: “What are the key barriers to you achieving your objectives?” shows your prospect that you’re a trained salesperson. Asking a prospect a question like: “I see that your biggest competitor, Widget Corporation, is coming out with a new product and I was wondering how you plan to differentiate yourself” shows your prospect that you’re a sales professional who understands the market.

The “Fourth R” is a powerful tool that, once applied in every sales interaction, will elevate you to the top one percent of all salespeople. You’ll elevate your value in the minds of your prospects from a vendor to a valued business partner. It is a critical component of practicing the Platinum Rule. You can’t guess what is important to your clients. Rather, you must have accurate information if you’re going to help clients in ways they want to be helped. The “Fourth R” techniques taught in this book to locate information will help you practice the Platinum Rule every time, for every meeting.

The good news is that virtually anyone can learn to master the “Fourth R.” You don’t have to attend library school. You don’t need a private investigator’s license. You too can learn to take the cold out of cold calling, and turn every sales call into a warm one.

# The Power of Google

<http://www.google.com>

In my presentations, when I ask what search engine people use, 90 percent of those in the audience raise their hands when I mention “Google.” For business people, Google seems to be the general search engine of choice, and the good news is that Google is a very powerful search engine for locating information that can be used during a sales call. However, very few salespeople truly understand the power of Google.

The following tips will help you get the most out of your Google search. What’s discussed is only a portion of what Google has to offer (for the definitive guide to Google searching, check out *Google Power: Unleash the Full Potential of Google* by Chris Sherman), but it’s the most relevant to the types of information needed by salespeople for Sales Intelligence.

Also note that many of the following tips work in other search engines like Yahoo and Bing. The search engine world is constantly evolving and the “search wars” are as fierce as ever, with the three major search engines battling for eyeballs by constantly introducing new tools.

However, because Google seems to be the search engine of choice for salespeople (and because I personally think that the folks at Google are brilliant), the following tips are ones I’ve learned over the past few years that make my Google searching much more powerful and get me the information I need to practice warm calling, usually within the first 20 or so search results.

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## Google Tip #3: Amnesia Assistance – When You’re Not Quite Sure

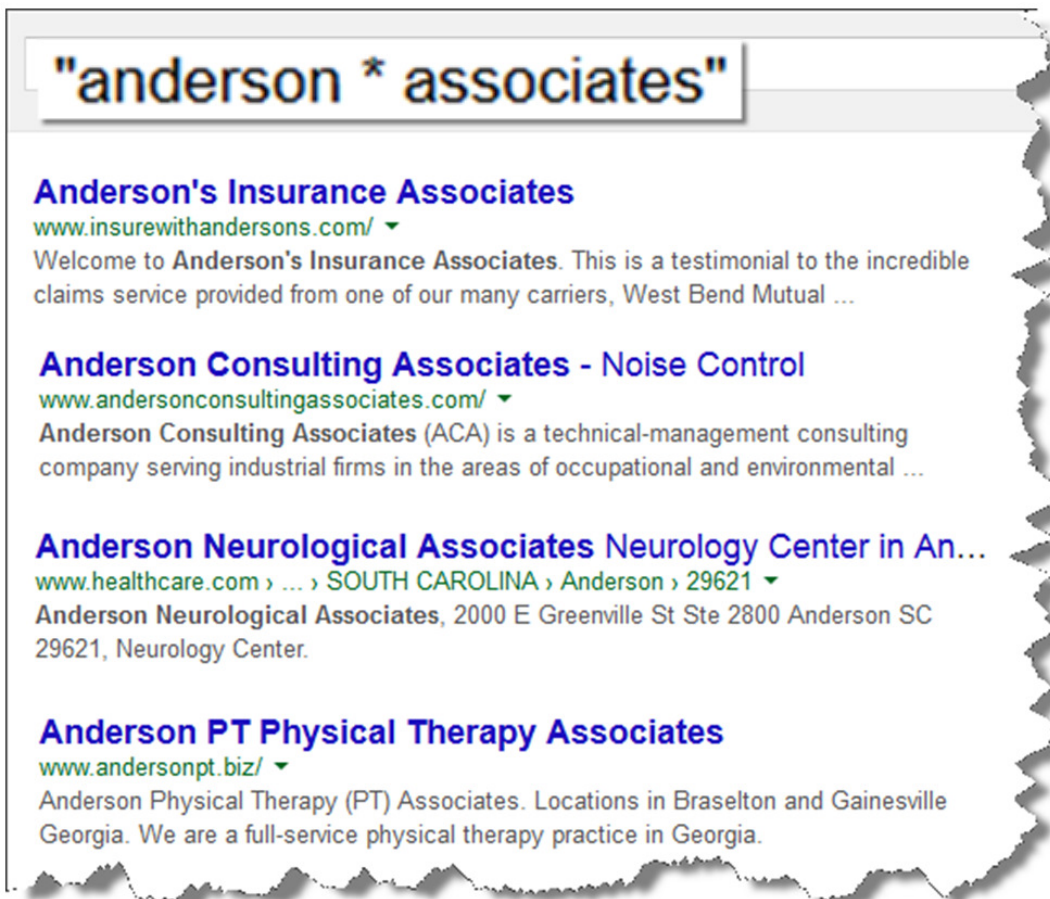
Have you ever been at a trade show or networking event where you meet someone and then when you get back to your computer and want to search for information, you can’t remember the person’s name or company name? This is assuming, of course, that you misplaced a business card ... and I’m assuming I’m not the only person in the world who does so. Thank goodness Google has a cure for people like me who suffer from “temporary amnesia.”

When you can’t remember a word or number of words when doing your Google search, just replace the missing word with an asterisk (in the search world, the asterisk is

### SAM TIP Asterisk:

If you can only remember part of what you’re looking for, enter an asterisk in your search and let Google fill in the blanks.

For example, enter “**vice president of \* at 3M**” and your results will return Web pages featuring the job titles of executives at 3M.



"anderson \* associates"

**Anderson's Insurance Associates**  
[www.insurewithandersons.com/](http://www.insurewithandersons.com/) ▼  
Welcome to Anderson's Insurance Associates. This is a testimonial to the incredible claims service provided from one of our many carriers, West Bend Mutual ...

**Anderson Consulting Associates - Noise Control**  
[www.andersonconsultingassociates.com/](http://www.andersonconsultingassociates.com/) ▼  
Anderson Consulting Associates (ACA) is a technical-management consulting company serving industrial firms in the areas of occupational and environmental ...

**Anderson Neurological Associates Neurology Center in An...**  
[www.healthcare.com](http://www.healthcare.com) › ... › SOUTH CAROLINA › Anderson › 29621 ▼  
Anderson Neurological Associates, 2000 E Greenville St Ste 2800 Anderson SC 29621, Neurology Center.

**Anderson PT Physical Therapy Associates**  
[www.andersonpt.biz/](http://www.andersonpt.biz/) ▼  
Anderson Physical Therapy (PT) Associates. Locations in Braselton and Gainesville Georgia. We are a full-service physical therapy practice in Georgia.



known as a wildcard) and Google will fill in the blank(s) with words that complete your search.

So, for example, let's say I was at a trade show and I met someone from Anderson XXXXX, XXXXX Associates, and we're going to get together for coffee tomorrow morning. I'm now in my hotel room and find that I left my collected business cards back at the trade show, and I'd like to do some research on the company prior to my morning meeting.

Instead of getting frustrated, I open up Google and enter **"Anderson \* Associates"** enclosing the entire phrase in quotation marks. Note that if there are multiple words that you're missing, you only need to enter one asterisk. Also note that Google will ignore conjunctive words like "and."

You can, of course, conduct a more complex Boolean query and add additional terms like the type of business, location, etc. For example, to limit your results on the above

**"vice president of \* at 3M"**

**Dan Simenc profiles**  
[www.linkedin.com/pub/dir/Dan/Simenc](http://www.linkedin.com/pub/dir/Dan/Simenc) ▾  
 Current: **Vice President of US Sales at 3M** Health Information Systems; Past: Regional Director at 3M Health Information Systems, Area Vice President - West ...

**[PDF] managing human resources for innovation and creativity**  
[utminers.utep.edu/.../Gupta-Singhal-Mana...](http://utminers.utep.edu/.../Gupta-Singhal-Mana...) ▾ University of Texas at El Paso ▾  
 Lester Krogh, **vice president of R&D at 3M** said: "We do not punish engineers who don't want to be managers. The dual ladder allows employees to go back.

**3M Co MMM Q4 Earnings Call Transcript - Morningstar**  
[www.morningstar.com/.../earnings-call-transcript.aspx?...](http://www.morningstar.com/.../earnings-call-transcript.aspx?...) ▾ Morningstar, Inc. ▾  
 I would now like to turn the call over to Matt Ginter, **Vice President of Investor Relations at 3M**. Matt Ginter - VP, IR: Thank you and good morning, everyone.

**Hak Cheol Shin: Executive Profile & Biography - Businessweek**  
[investing.businessweek.com/.../person.asp?...](http://investing.businessweek.com/.../person.asp?...) ▾ Bloomberg Businessweek ▾  
 Mr. Hak Cheol Shin has been an Executive **Vice President of International Operations at 3M** Company since May Mr. Shin served as Executive Vice ...

search, you could craft a query that looked like this: **“Anderson \* Associates” + accountant + Minneapolis**.

For salespeople, another way to use the Google asterisk trick is when you’re searching for various job titles at a company. For example, if you’re looking for the various vice presidents at a company, you can enter the job title as it might appear in an article but add an asterisk where the specific part of the job title might appear. Make sure to put the entire title within quotation marks so it’s treated as a phrase.

If I want to find executives at 3M, I enter **“vice president of \* at 3M”** and Google returns some great results. If you want to limit your search to vice presidents within a specific division, which might be helpful for a larger company, add terms like “marketing” or “sales” (**“vice president of \* at 3M” + marketing**).

## Google Tip #3.5: Locating Email Addresses

You can use the Google asterisk trick in another way that answers a question I receive from salespeople quite often: how do I get email addresses for my prospects?

Most email addresses end the same way as the company website address. For example, the website addresses of the financial services software company where I’m chief marketing officer is [www.actifi.com](http://www.actifi.com), thus all of the email addresses associated with that site end in xxxxxx@actifi.com.

To locate email addresses, just use the asterisk as a replacement for the first part of the email address. For best results, put your search between quotation marks. For example, if you wanted to find email addresses for some of the people at ActiFi, you would enter **“\*@actifi.com”**.

Often times, by clicking on the link, you can see the title or job responsibilities of the person whose email address you found.

If you do get a lot of results, and you may when you’re trying this for larger companies, you can also add search terms to the query. For example, you can add job titles (e.g., “vice president” — remember to use the quotation marks) or even add a

## SAM TIP

### Email Locator:

Use the Google asterisk trick to locate email addresses by entering an asterisk in front of the @ symbol, followed by the company's website extension. Put your search between quote marks.

For example, “\*[@actifi.com](mailto:ric@actifi.com)” will return email addresses from people at ActiFi. Once you have the naming convention (e.g., first initial, last name, website address), you can usually figure out anyone else's email address at the company.

To locate email addresses you may sometimes need to click on other result pages beyond the first page. If you still don't see email addresses, try adding terms like “email” or “contact” or Filetype:pdf to your search.

If you think you have figured out an email address, try verifying it at: <http://verify-email.org>.

NOTE: Do not “mine” the Web for email addresses. Use this trick only when you can't find the email address of someone where you have somewhat of a relationship. Google can even block you from conducting a search if it sees that you're spending too much time searching for email addresses.

“\*[@actifi.com](mailto:ric@actifi.com)”

#### Newsroom - ActiFi

[www.actifi.com/newsroom/](http://www.actifi.com/newsroom/)

Sam Richter, Chief Marketing Officer [richter@actifi.com](mailto:richter@actifi.com). Related Information. Company Fact Sheet · Executive Bio · Employment Opportunities ..

#### TRACK: SESSION: 941002 MARCH 5

[www.fpanet.org/fpanet/iframeapps/handouts/.../941002%20-%20Segal.pdf](http://www.fpanet.org/fpanet/iframeapps/handouts/.../941002%20-%20Segal.pdf)

File Format: PDF/Adobe Acrobat

Mar 5, 2011 – Spenser Segal, CEO, has more than 20 years of experience in the Thank You! Spenser Segal [segal@actifi.com](mailto:segal@actifi.com) [www.actifi.com](http://www.actifi.com).

#### January, 2010 - ActiFi

[www.actifi.com/newsroom/newsletter/10\\_january\\_newsletter.php](http://www.actifi.com/newsroom/newsletter/10_january_newsletter.php)

If you'd like to schedule a meeting with ActiFi while you're in New Orleans to learn please contact Tom Rozman at [rozman@actifi.com](mailto:rozman@actifi.com)

#### Industry Veteran Brian Stimpfl Joins ActiFi Executive Team | Press

[pressrelated.com/press-release-industry-veteran-brian-stimpfl-joins-a...](http://pressrelated.com/press-release-industry-veteran-brian-stimpfl-joins-a...)

2011. Adding Brian Stimpfl to the ActiFi executive team. Brian Stimpfl previously worked for...

name. This may help you better identify prospects or even a specific person's email address.

It's important to note that there is no guarantee that the email addresses will be correct, or that the person even works at the organization any longer. But this is a quick and easy way to identify email addresses and address naming conventions (e.g., if you find [psmith@widget.com](mailto:psmith@widget.com), [janderson@widget.com](mailto:janderson@widget.com), etc., it's highly likely that Julie Jones' email address at Widget Corp. is first initial, last name, [jjones@widget.com](mailto:jjones@widget.com)).

Here's a tip when searching for email addresses if the addresses don't show up on the first page of Google search results. Unlike the other tips in this book that will hopefully get the results to the top of the results page, when searching for email addresses, you may have to randomly click on page 10, 30, 50, etc. to find what you want. Another tip is to add words like “email” or “contact” or Filetype:pdf to your search.

Remember, what you're doing is searching for information on a Web page, meaning that the email address has to be in virtual print somewhere. It could be a bylined article or a listing on an internal Web page, for example. However, you

are not searching a company's email directory; the information has to be in the public domain for you to find it.

**Finally, it's incredibly important to remember to not use this trick to blindly gather email addresses and then use them to send unsolicited email.**

Spamming is not only unethical, it is also the quickest way to create a negative reputation for you and your company. It can cause all future emails from you to get blocked and/or end up in your recipients' junk mail box, and instead of gaining new business, you'll lose it. Only use this trick when you know the person and/or company you want to contact and you're fairly sure they want to receive your email.

## Google Tip #4: Company Site Search

A great way to eliminate thousands, if not millions, of search results, while ensuring you get relevant information related to your search, is to limit your search to a specific site. This can be very helpful for the salesperson looking to get specific information on a company or trying to locate a person by title or name at a company.

The trick to a Site Search is to end your search with *Site:* (site colon) and then the name of a website. When entering in the website name, do not enter the *http://www*. Rather, just enter *Site:xxxxxx* and replace "xxxxxx" with the name of the website including .com, .org., etc.

For example, let's say I'm interested in learning the names of marketing directors at General Mills. I could enter "marketing director" + "General Mills" in Google and get tens of thousands of results, some good, but many irrelevant. Another way would be to restrict my search to only websites operated by General Mills by entering the following query:

**"marketing director" site:generalmills.com**

Entering this query returns results only from the General Mills website and the results include press releases and news articles with the names of various marketing directors at General Mills.

### **SAM TIP** **Site Search:**

You can limit your search results to a specific website by using the Google site search tip.

Just enter the information you desire, followed by Site: and then the company's website address.

**sales site:3m.com** will only search 3M websites for pages with the word sales.

You can also use this type of query when looking for phrases like “annual revenue” or “client list.” Just enter the phrase using quotation marks followed by “site:” and then the address of the specific website (e.g., “marketing strategy” site:widget.com). Obviously, the phrase you’re looking for



must be somewhere on the site you’re interested in or you will not receive results.

Another good use of the Site: search is when you quickly want to learn about a company’s history prior to a sales call. You could just go directly to a company’s website and see if they have an “About Us” or “Company History” page directly off the main website navigation.

Or you could save yourself a lot of time by instead going to Google and in the search form entering this query: “about us” OR history OR biography site:widget.com. The search results will deliver pages with the phrase “about us,” or the words *history* or *biography* thus getting you the information you need, instantly, versus spending time searching the company’s site.