

ICEBERG SELLING GUIDE



Everything Is an Iceberg

Everything you see and everyone you meet is only showing you 10 percent of their story. Approach sales—and everything else—knowing 90 percent is below the surface.

- A lifetime-value mindset brings you much more value than looking only at the transaction in front of you.
- A being-of-service mindset helps you create value outside of the typical day-to-day sales role that most salespeople fall into.
- An ownership mindset gives you the power to author your own story and architect the experiences you want to create.
- A drivership mindset empowers you to create urgency, make things happen, and move opportunities forward with intentionality and greater success.

Has your partner ever yelled at you about how you're loading the dishwasher wrong? Did they seem a little more upset

than they should be about something so basic? Chances are, there was something deeper than that going on, another reason they were frustrated with you. They just weren't saying it.

Have you ever seen a little kid have a full-on meltdown because someone told them to put socks on? It probably wasn't about the socks. It was probably because they were overtired, or didn't want to go home, or a combination of the zillions of reasons kids cry.

And, more to the point of this book, have you ever had a great call with a new customer only to have them ghost you? Chances are there were things going on with them you didn't know about, either. That's because, even in sales, there is always more to a situation than meets the eye.

That leads me to the number one rule I want you to get from reading this book.

Everything is an iceberg.

Icebergs that float out in the oceans come in all different shapes and sizes. Some are pointed, some are round, some flare out, and other ones go straight down. Some of them are huge, and some of them, if you blink, you'll miss. The one thing they have in common is that they are all 90 percent underwater.

And just because you have seen one iceberg doesn't mean you are an expert on every single one. To navigate an iceberg safely, you need to explore it, or you might end up crashing into it and sinking (even if you think you're the king of the world).

You know that your partner is annoyed with you, that the toddler is crying, and that a customer hasn't gotten back to

you, but that's only 10 percent of what is actually going on in any given situation. Each one of those things are symptoms of something bigger. They're only the actions you see on the surface. There's always a lot more happening below that.

Keeping your partner happy with you is about more than doing the dishes their way. It's about truly understanding who they are, what fills them up and what wears that down. It's about seeing your partner in their entirety and meeting them there. If you want the toddler to stop crying, shouting at them to be quiet won't do the trick. But taking a moment to understand why your two-year-old is raging might be a good next step. When you spend the time investigating and getting curious about the root cause, the path forward often becomes clear.

It's no different with your customers. As a good salesperson, you know every customer is a little bit different. You don't assume one person or company needs the same thing as another. That leads to misreading a situation, getting ghosted, and losing sales. If you want to find out what's keeping a customer from responding to you, you need to understand what is really important to them. You need to be sure you showed them enough value and understanding in your last interactions and that you provided a clear and compelling path forward.

In the world of sales, one of the biggest and most frustrating risks is getting stuck in something I call the check-in zone. You've probably been there and know what I mean. It's that place where you think you created value, and you think

things went well in your interactions, but the customer stops responding to you and you feel you have been ghosted.

So now you find yourself in that dreaded place...that place where all you feel you can do is check in. You observe yourself leaving voicemails or text messages or writing emails with empty lines like...

“Hey, do you have any questions? I’m just checking in.”

“Just pinging you again to see if there’s anything I can do for you.”

“Do you need anything? Please reach back out if you’d like to talk further.”

“Hey, I haven’t heard from you in a while—are you breaking up with me?”

(Okay, that last one might not apply to your customers, but you get the picture.)

Getting stuck in the check-in zone feels horrible. Suddenly, we don’t feel like we have any traction or any path forward. We have no idea why things have stalled, and we start to send more and more desperate messages. What is happening is we start to make the sales about ourselves and what we need, but we disguise it in language about helping them or answering their questions.

After all my years working in sales, I can tell you that in the check-in zone, it’s super likely you’ve run into trouble because you looked only at the 10 percent of the customer’s iceberg that is above the surface.

If you don’t walk away from this book with anything else, there’s one thing I want you to remember. To go from being

a good salesperson to a great salesperson, you need to think about every person, every event, and every company you deal with as an iceberg. And to really keep out of trouble, you can't wait to do so until you've already run into it.

When you are first getting an understanding of what a customer wants from you, you are just seeing what is on the surface. Learn to look deeper and you find more ways to connect. Then you start to build stronger relationships. Navigating an ocean full of icebergs involves preparing the right way and moving forward with confidence.

Now, that doesn't mean icebergs are purposefully out to sink you, just like the people and situations you encounter every day aren't there to trip you up. They are just there, going about their iceberg business, and it is up to you to decide what to do with them. Do you want to pass them by? Do you want to stop to explore them? Or do you want to pretend they aren't there and risk wrecking everything?

No matter what you decide, you never know what's going on with an iceberg from one look. Lacking knowledge creates risk, whether you are steering a boat off the coast of Greenland or heading into a sales call.

With Iceberg Selling, you'll be at lower risk, and you'll be ghosted less and less. Your customers tell you they want to buy from you, and together you will chart next steps and get into mutual agreement on the path forward. As a bonus, the more you see everything as icebergs, the better you'll connect with other human beings. That's because when I say, "Everything

is an iceberg,” I mean *everything*. Your family, your friends, your colleagues, your customers, your favorite barista—all of them have entire stories that you will only know if you seek to understand them.

So, here are the first steps in how you can train yourself to be an Iceberg Seller. It starts with you tapping into four mindsets: a lifetime-value mindset, a being-of-service mindset, an ownership mindset, and a drivership mindset.

The Lifetime-Value Mindset: Look Beyond the Deal

Sometimes salespeople get tunnel vision about closing sales. Okay, a little more than sometimes. Often salespeople get stuck obsessing over getting a deal signed, and that obsession reflects a transactional attitude and not the much more sustainable lifetime-value mindset.

Here is a story about a salesperson I know who got totally fixated on the deal. His name is Ethan, a salesperson at an events company called United Events.

I was running United Events’ weekly sales meeting with a team of six salespeople, and it was Ethan’s turn to speak.

“So, Ethan, do you have any deals that are stuck right now?” I asked him.

“Yeah, I do,” he said. “I met this meeting planner about six months ago at a conference, and we totally hit it off. Her

company was a perfect fit, and I think we could do a ton of events with them. About a month ago, she sent me an RFP for an upcoming event, so I answered it and created what I thought was a great proposal. I sent it to her about two weeks ago, and I haven't heard anything back. I've called, left voice-mails, and sent emails. Now their event is coming up, and I don't know if we are doing it or not. I'm really frustrated."

The team started throwing out solutions for him, bringing up questions that he could ask and giving him advice on how to word his next outreach to her. It was all the same sort of awkward check-in zone outreach that salespeople seem to always do in these situations, the ones that make them look more and more desperate as they try to close the deal.

Finally, I stopped the conversation.

"Time-out," I said. "Ethan, do you care about winning this one RFP, or do you care about the lifetime relationship with this meeting planner and her company?"

He paused and then said, "The lifetime relationship with the meeting planner."

"Great," I said. "So, don't do anything right now that's going to jeopardize that. Do yourself and her a favor and don't keep checking in. What is done is done. Refocus on how you can be now to ensure you have opportunities later. Maybe this one will work out, but try not to get yourself all worked up. If you truly are after the relationship, then play for that, and you'll have much greater success in the long run."

Ethan's mindset wasn't serving him or the customer. In fact, it was putting his relationship with her at risk. Reaching out again and again about whether United Events was going to produce her upcoming event was making Ethan look a little desperate and was risking the original vision of the two companies working as partners on events over time. No matter how he wordsmithed his messages, his actions were all about being awarded the RFP. Ethan had gotten distracted from what would create value for the meeting planning company and how United Events could best support the customer. It has become all about closing the immediate deal.

That mindset was completely changing his behavior too. He needed to get out of his head and stop second-guessing himself. Not hearing back from the meeting planner was wreaking havoc on his confidence and causing him to make poor decisions that could affect the long-term potential of the account. This kind of change in perspective—away from the short term and toward the long term—is at the core of Iceberg Selling.

I want you to think about all the people you sell to and ask yourself how you look at the relationship with them. Is it about the lifetime or a short-term transaction? When considering the ones in the second category, take a step back. Instead of trying to force a deal, think about how you can create more value and build a relationship where they see you as worth working with in the future. There's a real cost to hyper-focusing on getting someone to sign on the dotted line only so you can make your monthly sales goal.

Even if a deal doesn't work out, even if you never end up working with a customer, working toward lifetime value over short-term deals can do wonders for your company's reputation.

In contrast, another events company, All-Productions AV, has a great track record with their customer relationships and a ton of lifetime value customers. At their core, they are a group of professionals who care about putting on great events. So they follow up with every lead who decides to work with someone else to produce their event. They also follow up with every lost deal a few days after the event they would have produced. They do this for a few reasons. Companies that put on events typically put on multiple events throughout the year, or at least they hold the same event every year. So, in a way, they are evergreen leads.

All-Productions AV also reaches out as a way to reflect the value of their brand, that they are always looking to support companies, their messages, and the outcomes they want to achieve from their events. By reaching out after an event, they are positioning their company as one that cares, full of people who are genuinely interested in the event host's success and believe in communication and collaboration. It also shows the customer that they play for the long-term relationship and not just the one-off opportunity.

Whenever they reach out to customers who ended up going with another event company, they get extremely positive responses that reflect the spirit of building valuable long-term relationships versus chasing deals. Here are a few of the real-life responses they have received.

“I’m very impressed by the professionalism and comprehensiveness of the proposal and All-Productions AV’s process compared to other event providers. Thank you for reaching back out and asking about our event.”

“Your professionalism and dedication throughout the engagement were commendable. I genuinely hope that we will have an opportunity to work together in the future.”

“All-Production AV’s workflow, the proposal you provided, and the portfolio of offerings were the best, undoubtedly!”

Consider what you are playing for in your interactions with customers. Is it the lifetime value or the immediate transaction? Depending on the impression you want to create, you can’t lose sight of how your actions affect your relationships. Ask yourself whether you’re forcing or manipulating a decision rather than creating value.

If you want to make a lasting, positive impression on your customers or even other people in your industry, taking on a lifetime-value mindset is the way to do it. And remember, when you’re Iceberg Selling, it’s not just about the value that having a long-term customer can bring to you. Even more, it’s about the value you can bring to others.

The Being-of-Service Mindset: Be a True Resource for Your Customer

When your sales approach is focused on others, you create value outside of the service you want to sell to them. Knowing what will be of service to someone involves looking deeper than the tip of the iceberg.

About six years ago, I worked with a company to develop their sales process and train their team. Four years later, they contacted me again. The market had changed, and they wanted me to look at their sales pipeline and the sales team's performance and see if I could find ways to create more success. As I started the engagement, I met their new director of marketing, Blake. I instantly liked Blake. He was smart, driven, and dedicated to making things happen. He also knew that success would compound if he could make sure sales and marketing were working well together.

So, I met with the company's three salespeople and reviewed the sales process. As I dug into the deals in different stages of their sales funnel, I found a lot of quick wins and strategized with the team to get the sales funnel moving again. It all worked, and the sales and marketing team could feel the energy and forward movement.

At the same time, I could see that Blake wanted more and that he was maxing out his current abilities. When I learned that the CEO wanted to add another salesperson and was about to ramp up a job posting, I did what comes naturally

for many of us, and what I believe any of us would do if we realized we could create even more value for our customers. I reached out to my network, shared the job posting, and actively recruited a few salespeople I thought would be interested in the position. One of them got really excited, and I made an introduction.

Another one of my clients was about to hold a half-day marketing workshop, which I knew would create a ton of value for Blake. I called my client and told him about Blake, and he invited him to the workshop with a comp ticket as a professional courtesy to me.

I didn't need to do any of that. I could have stayed within the lanes of my assignment and been happy with the quick wins and the momentum of the team. Instead, I added value outside the engagement. I looked beyond the tip of the iceberg. As I learned more and more about what this client needed, I could create more and more value.

There's another dimension to this too. The salespeople I recommended that the company interview for the new job benefitted. So did my friend who was running the workshop that Blake attended. That's because being of service isn't a box you check when you're doing a job. It's a mindset, a way you approach everything in life.

We all know the phrase "you get what you give," but most people don't give just to get something out of it. Giving is worth more than that, and receiving things in return is never guaranteed. We give because we want to be of service to others.

For me, I feel good, I feel complete, I feel connected when I can support others. It's part of how I am wired, and in my experience, it's part of how most salespeople are wired.

If you're reading this book, you're probably wired to be a giver. You're playing for yourself, of course, but you're also looking to create value in the relationships that you have, both within your job and outside of it.

But maybe you haven't really figured out how to go the extra mile with your customers. My invitation to everyone I coach, to the rooms of people I speak to during conferences is to give this spirit of service a try—even if it's for only a moment. Think of a customer you know, or a colleague, friend, or family member, and then look at them as an iceberg. What do you know about them already, and what's underneath that? What do they want to accomplish right now? What are they going through? And what is something you could do for them to make a difference in their life right now?

If you're having a hard time figuring out how to get inside of another person's world, imagine that some kind of *Freaky Friday* thing just happened to you and one of your good customers. Suddenly you're in their shoes. Ask yourself what your world is like right now. What do you know about your new self, personally? What's it like for you at work? Is it stressful? Is there a major initiative or deliverable that is due? Is there a project or a goal that is keeping you up at night? Why did you reach out to, well, the real you in the first place? Why are you a current customer or a company thinking about being

a customer? Then think about what you want from someone, how that person could positively affect your world. Back in your own life, in your own shoes, you can deliver that to your customer.

Ethan at United Events, for example, could share what he has seen firsthand that delights audiences. He could provide inspirational photos of past events his company has produced, offer a list of favorite event venues, or better yet, offer to visit these venues with his customer. He could even invite his customer to be a guest at one of his (other) upcoming events so that she could witness his brand firsthand.

Other ideas that work for any field include asking your customer if they would like to meet for a coffee to talk shop and explore how your two companies could partner together in the future. You could introduce them to clients you've worked with before on similar projects so they can compare notes and share experience and ideas. Even if it just expands their network, you're still giving them something that enriches them.

Whatever you think up, it's the intent that you put behind it that creates the real value. By following the being-of-service mindset and making it a habit, you can't help but see more of what is going on with the people around you. You will see more of the iceberg, and this in turn will create more opportunities to be of service as well as create more and more value.

Ownership Mindset: Take Control of Your Reality

Did you know that you can take control of a situation and influence the outcome? Well, you can. It's so obvious that lots of people can't see it. And it's super true in the world of sales.

Many people don't realize how much power and control they can have over their own experiences. They think they can't act until someone gives them permission. You might even witness this in your sales organization—salespeople waiting to act until their sales manager tells them what to do. This goes against one of the most powerful reasons people decide to get into sales. Remember when I asked you to determine what you were playing for? Hopefully when you thought about why you were in sales you felt charged up and in control of your own destiny. If that's the case, why are any of us waiting for others to say it's okay?

Here's the good news. You've got a job to do, and you don't have to wait for permission to get into action. You are the author of your own story. You are the architect of your own experiences and the experiences you want to create for your customer and the accounts you manage.

Some of you might not fully believe me. Maybe there is a voice in your head saying, *I wish that were true*. It is true. You're in sales. You are a professional who was hired to make things happen. You're independent, smart, driven, and motivated. This is why it's so important to get connected with what you

want and where you want to go, why it's so important to claim what you are playing for. It's the fuel of confidence and action.

No one other than you is standing in your way of owning your reality. Believe it and act on it, because the ownership mindset might be the biggest and most important mindset in sales.

So, what exactly is an ownership mindset? It's taking all the responsibility for something. One hundred percent. In sales, this means you get to decide how you want to show up for a new customer and how you want to manage an account. It means that you are a leader who decides how to design an experience then makes it happen.

The ownership mindset also applies to how you want to shape your own future. If there is something that will shape the future you want for yourself, you obsess over it and make it happen. Need more skills? Then advocate for yourself and get more education and training. Want to be in the President's Club? Then get motivated, create a plan, and work the plan until you achieve that.

With an ownership mindset, you get to decide what you want to do and how you want to be in any situation. An ownership mindset is not letting someone else decide what you do next. It's about owning what you think is the right next move and not giving up until you make it happen.

Making the ownership mindset shift—from waiting for permission to saying, "Wait a minute, I really am in control"—can totally change the game. It can totally change your life. This

simple belief empowers you to do a lot more with what you have, leading to big wins and moving you from being a good salesperson to a great one.

Let me tell you about Jessica. Jessica lives in Denver and sells for a professional services company. She is responsible for opening new accounts as well as for retaining, managing, and growing the accounts she brings in. The company has a distributed team with clients all over North America. While she is in Colorado, the corporate offices are in Kansas City. I had been coaching Jessica for a few months, and the company had tagged her as a rising star on the sales team for her ability to open new accounts and effectively represent the company.

One day the CEO called and asked her to take over an account he had recently brought into the company through his personal network. It was a big deal for Jessica, and it was also a big deal for the CEO to let go of the account.

The CEO knew the customers at this account very well, and he told Jessica, "I think you can grow this account and turn it into one of your top five accounts." Jessica was almost bouncing off the walls when she told me all of this in our coaching session.

Over the next month, every time I met with Jessica, I would ask her what was going on with this new account. Week after week, she would give me answers like "I reached out to them with an email but haven't heard back," and, "I am not sure I know what the CEO wants me to do with this account," and, "I think it's going well, but I'm not really sure."

I don't think Jessica ever realized that she had the agency to fully own this account, to be the individual fully responsible for its success and growth.

After several weeks of those answers and a general feeling that Jessica wasn't making things happen with this account, I finally asked her, "Can I tell you why the CEO gave you this account and what he expected you to do with it?"

Jessica said, "Yes, please! Because I am feeling really lost about what to do next."

This is what I told her and what I would tell any salesperson in a similar scenario:

"If you want to grow this account, then you need to take the actions to really own it."

I told her to prioritize getting to know everything and everyone involved with the account. She should manage up and get on the CEO's calendar to learn everything he knows about it, why he thinks it could be a top five account, and any advice he'd have for her. Then she should do everything she could to connect with the customer to learn about them, their company, their current state, and their desired future state.

"Schedule a trip to Kansas City to meet with them, do your homework ahead of the trip, and bring ideas you think will both resonate and generate value for them. Commit to understanding everything you can about this new account and to being of service to them, think bigger than what they buy from you, and focus on building a high-value, ongoing partnership. Prioritize your time to support this account

and step into a proactive role where you are thinking about how you can bring them value throughout the year...and then do it.”

Drivership Mindset: Make Things Happen with Greater Success

Feeling urgency. Being proactive. Deciding you are the driver and not the passenger. This is what the drivership mindset is all about—making things happen and not waiting for them to happen to you.

Let’s say a new customer comes into your sales pipeline. You review the background on the customer, and the customer is perfect in every way you can imagine. They have the budget, the authority, and the need, and they want to move quickly. So, what are you going to do about it? If it’s five when you get the assignment and you are about to leave for the day, are you going to follow up in the morning? Or are you going to reach out right away?

Great salespeople are drivers, plain and simple. They are the ones in constant motion, moving from one action to the next. We can see this in how they approach situations, solve problems, and overcome challenges.

A new opportunity comes in. They are on it.

A customer reaches out with a question. They respond right away.

They have an idea to generate more sales. They get intentional, and they get to work.

Some salespeople seem to be more passenger than driver. They wait for their sales manager to tell them what to do; they wait for the phone to ring or the next email request from their customers. When it comes to closing deals in their pipeline, they usually have an excuse for why they shouldn't reach out to drive things forward. These salespeople say things like:

“Oh, I didn't know I was supposed to do that.”

“Well, the client didn't give me that information.”

“I am still waiting for them to call me back.”

“I don't want to bug anybody.”

Great salespeople don't say things like that. Instead of giving up responsibility, I want you to be the driver who is already planning the next step, and the step after that, and the step after that. Be the salesperson who knows where they want to go and guides the customer there.

No one is going to do your work for you. No one is going to swoop in and magically make you a success. Success is up to you, and with a drivership mindset, you can make it happen.

Some salespeople resist a drivership mindset out of a fear of being too aggressive, too pushy, or too salesy. To that, I say, if you're truly creating value, if you truly can help your customer with their problems, if you truly can create a better reality for your customer, then you have the responsibility to take control and guide your customer forward.

Let's say you are a recruiter who specializes in placing nurses at hospitals. Customers come to you to staff their hospitals so that they can continue to serve patients and save lives. Now let's imagine a rural hospital calls you to help them find an emergency room nurse. They are in dire need. Their current staff is overworked, and they are the primary medical facility for the community. You take the assignment, and your point of contact tells you they are about to go on vacation. Then fortune smiles on you and you find an amazing candidate who is interested in the position and open to moving. What do you do?

What do you think would bring more value to the hospital: waiting to contact your customer when they come back from vacation or calling them right away?

If you have a drivership mindset, you call them now and move your candidate forward as fast as you can, for both your customer's and the candidate's benefit. And guess what—most likely both your customer and the candidate will thank you for your urgency and for taking the reins and moving things forward. And so will the community and the staff at the hospital.

If you truly have something of value, put it forward.

Act decisively. Act quickly. Make things happen.

Mindset Shifts Help You See Below the Surface

With Iceberg Selling, you will raise your game. You will increase your own performance, have more confidence,

communicate more effectively, and close more business. You will also feel more connected to your customers and be seen as a partner in their success.

A lifetime-value mindset, being-of-service mindset, and ownership and drivership mindsets are the baseline you need to go from a good salesperson to a great one. They're the landmarks you'll use as you navigate what I'm about to share with you. Plus, if you're able to make even the smallest of the mindset changes or start using a few of the best practices I'm going to give you in this book, you will see results fast.

You will see your life change. You will achieve what you're playing for. So, let's dive in.

