

Plan. Prepare.  
Expect to  
succeed.

# Cooperative Contract Selling

## Successful sales and communication strategy

As a sales professional develops a strategy to sell to government and education agencies, a consistent approach is the proven way to grow success with the awarded, Sourcewell contract. Here is a strategic outline to a successful sales and communication strategy.

1. Develop a Sourcewell-specific sales plan that includes a breakdown of customer verticals.
2. Understand Sourcewell, the cooperative contracting way of business, and the value the contract brings to the customer and procurement process.
3. Request contract training from your company management or Sourcewell to establish confidence in the Sourcewell cooperative-contracting message.
4. Be familiar with the Sourcewell website and marketing tools.
5. Understand your contract, the RFP document, contract documentation and your contract landing page.
6. Understand the sourcing clause.
7. Understand ceiling-based pricing, your ability to lower the price, and how and when volume or competitive environment dictates pricing advantages.
8. Understand your company's RFP submission and resulting awarded, full-line, solutions-based contract.
9. Understand the ability to add additional or required agency Terms and Conditions at the purchase-order level.
10. Know how to access and leverage the Sourcewell participating agency list, or online lookup, and be able to lead a customer on how to become a member.
11. Develop a business plan to convert current customers to Sourcewell, to secure and retain current business, and to establish flagships for new customers.
12. Target potential customers and verticals to include where you have not been.
13. Determine needs and timing of agency well in advance of the customer's own contracting process and requirements.

## Prepare for the meeting

- Develop a Sourcewell packet as a meeting handout.
- Develop and send an electronic communication before the meeting and allow time for the customer to review the information and your Sourcewell landing page contract content.
- Include and highlight the “How Sourcewell Works for You” video, marketing material, and messaging links.
- Anticipate contract or Sourcewell questions and come prepared to answer.
  - Sourcewell is a government agency.
  - Competitively awarded contracts are held by Sourcewell as its own lead agency.

## Customer talking strategy at the meeting

- Once trust, timing, customer need, and interest have been determined, ask:
  - Are you familiar with the benefits of cooperative contracting?
  - Are you legally and within local policy able to leverage or use national cooperative contracts?
  - Be ready with an organized information outline. Explain who Sourcewell is as an organization and how we conduct contract business on behalf of qualifying agencies.
- Explain the value and advantages of your company’s Sourcewell contract as it applies to your products and equipment and why you, a company representative, feel it is a good pathway to purchase your products/equipment.
- Let them tell you how they feel about your Sourcewell contract and if it would be a good fit within their contracting process and requirements.
- Offer to provide additional information on Sourcewell as an organization or the Sourcewell-contracting process.
  - Suggest the customer consider joining Sourcewell at no cost or obligation. Ask about the timeline for the potential PO.
- With or without a PO, summarize your conversation and follow up with any expectations of the customer.
- Based on the customer-demonstrated comfort with Sourcewell, inquire if the customer would be willing to share the value of Sourcewell contracts and participation with other departments of the agency and within their regional circle of contacts.
- Once the business or relationship has been secured and competing Sourcewell contracts are not a factor, consider sharing Sourcewell has over 400 world-class contracts that can be leveraged throughout the customer’s agency or by other agencies within their circle of contacts. Helping an agency solve other needs can strengthen a current or new relationship.

## Follow up to the meeting

- With or without a purchase order in hand, follow up with a thank you and provide any requested information.
- In the event of a purchase order, ensure shipping, delivery, and set-up are scheduled. Follow through on established customer service, including flawless billing.
- After successful delivery and use of your products and services, seek permission to reference this customer as a flagship customer and testimonial.
- Ask if this new Sourcewell user gathers with other agencies and if there is an opportunity to be a part of an upcoming meeting agenda.
- Build on this sales experience and continue to leverage your Sourcewell contract to be an example for your company sales teams.
- Share your success with other sales professionals within your company and other Sourcewell-contracted suppliers.