



The Evolution of Engagement

Leading your Sales Force into 2021





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Introduction

The preliminary impacts of COVID-19 are far reaching, and sales teams across industries are now reconciling this new reality with age-old tools of the trade. From face-to-face meetings and trade conventions to business travel and rallying sales team engagement, the sales field is being redefined. However, the collection of research that informs this paper indicates just how varied this redefinition can be across sales sectors. One thing seems certain: sales teams, now more than ever, should be leaning into new opportunities to innovate, to build relationships, and to collaboratively fortify corporate legacy by adapting gracefully to our new economic and social arrangements.

Part of the information presented in this paper is derived from several interviews with industry experts, including sales team managers and salespeople with vastly different employment experiences. Most of these interviewees have found success in industrial manufacturing and construction, but some have also cultivated expertise in automation, Software as a Service (SaaS), and municipal and commercial construction. There were several prominent trends found that will be discussed presently, but what emerged throughout the conduct of this research is the extent to which corporate culture and perspectives vary on the topic of sales in a post-COVID-19 world, even in similar industries.

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DISCUSSION: PHASING OUT IN-PERSON SALES PERMANENTLY

For most professionals working in Canada, early March 2020 marked the transition to company-wide work from home protocols in keeping with Health Canada's guidelines.¹ Mandated social distancing necessitated the transfer of Monday morning meetings and Friday afternoon catch-ups to digital platforms, with hundreds of thousands of people relying on Skype and Zoom to see colleagues'—and customers'—faces. While social distancing guidelines have adapted to allow for in-person visits given proper personal protective equipment (PPE),

many offices are still avoiding the re-introduction of face-to-face meetings in all but a few cases. The surprising reason for this shift? Many sales teams are finding in-person meetings are not necessary to the team's success.

Further, some industries have seen very little customer demand for such meetings in recent months. In fact, earlier in the pandemic, TOPO reported nearly 50% of buyers were not interested in booking meetings at all, let alone meeting face-to-face.² "At the moment, there is very little if any expectation to physically be in the office," says Joel Brown of Nu-Trend, whose business often included site visits or per-

sonal deliveries of products.³ Amir Kassaian of Beckhoff Automation Canada echoes this sentiment. "Generally speaking, we've only been allowing onsite presence for essential calls or emergency support," said Kassaian. "In the coming months, we may return to properly distanced in-person meetings, but nowhere near the amount of those visits we were undertaking before the pandemic."⁴ Todd Walsh of Investors Group has been meeting all of his clients virtually. "Right now, all of our client interactions are virtual. We're able to manage this by leveraging technology," he says. "It's not ideal, but it will have to do for now—and this is how we will continue to operate for the foreseeable future."⁵

¹ Canada, Public Health Agency of. "Coronavirus Disease (COVID-19): Measures to Reduce COVID-19 in Your Community." Education and awareness. aem, August 10, 2020. <https://www.canada.ca/en/public-health/services/diseases/2019-novel-coronavirus-infection/prevention-risks/measures-reduce-community.html>.

² TOPO Blog. "150% Increase in Buyers Not Booking Meetings, COVID-19 Survey Reveals," March 23, 2020. <https://blog.topohq.com/150-increase-in-buyers-not-booking-meetings-covid-19-survey-reveals/>.

³ Personal communication between Rose Agency and Joel Brown, August 2020.

⁴ Personal communication between Rose Agency and Amir Kassaian, August 2020.

This is a remarkable departure from the tradition of in-person sales meetings, especially in industrial manufacturing and construction spheres. Sales across industries are arguably contingent upon the careful cultivation of relationships. This tradition is evident at the Los Angeles Times, where in July 2020, account directors began inquiring with Chief Revenue Officer Josh Brandau about entertainment budgets to resume golf meetings with potential customers.⁶ Despite California's ever-increasing number of COVID-19 cases, sales people have retained the expectation that in-person meetings remain integral to business—especially when cultivating new relationships.

“When you’re trying to establish new business, meeting in person is a must. It might take time for people to resume in person meetings and business travel, but eventually it will be the norm again,” says Jarkko Turtiainen of SaaS firm Cloudpermit.⁷ “It just has to. Sales is a personal business—it’s about getting to know your customers and building strong interpersonal relationships. That’s just not possible relying on Zoom alone.”⁷ Turtiainen’s team is phasing in face-to-face meetings, if the customer is comfortable, with thorough safety measures including specific PPE like face shields and masks along with ample hand sanitizer and distancing guidelines.

Sales teams seem to be of two minds on this issue. As illustrated, Kassaian and Brown are in no rush to return to in-person meetings, but Turtiainen views these as vital opportunities to build relationships. “Companies can reasonably save hundreds of millions of dollars by cutting out all of that travel and the expenses associated with it,” says Bill Condon of nVent. “So it will be interesting to see how corporations will respond when revenues come back online, and the world opens up. I think they’re going to reintroduce business travel slowly, to see where they can save and if that travel is even necessary.”⁸ A break from business travel for the better

⁵ Personal communication between Rose Agency and Todd Walsh, August 2020.

⁶ Digiday. “‘This Is a Relationship Business’: The in-Person Client Meeting Is Beginning to Make a Comeback among Publishers,” July 13, 2020. <https://digiday.com/media/this-is-a-relationship-business-the-in-person-client-meeting-is-beginning-to-make-a-comeback-among-publishers/>.

⁷ Personal communication between Rose Agency and Jarkko Turtiainen, August 2020

⁸ Personal communication between Rose Agency and Bill Condon, August 2020.

part of a year may well be cause for a reorganization of sales relationships—and may perhaps never reach pre-pandemic levels.

TREND: A YEAR-LONG CLIENT “HOLDING PATTERN”

As in periods of economic contraction like that which Canada is currently experiencing, corporations must look inward to fortify against catastrophic asset loss.⁹ Generally, these are periods during which growth-oriented projects are halted in favour of more strategic business plans that emphasize internal, low cost work.¹⁰ Often, these projects might include revamping internal

processes and systems, or seeing that long incomplete projects are finally resolved. But by and large, big expenditures are under greater scrutiny—making the job of a salesperson much more difficult.

Just like their clients, many sales teams are undertaking the same measures to fortify existing relationships as their clients remain in timid, conservative states anticipating further economic turmoil. “A lot of companies, customers, and suppliers alike seem to be in a holding pattern of sorts,” says Sean Greenhill of Metrie.¹¹ Joel Brown at Nu-Trend used precisely the same terminology. As new products struggle to reach market and customers

remain reticent to engage larger expenditures, “everything's just kind of stalled,” he says. “We're just kind of stuck in a holding pattern.”³ Subsequently, sales teams in Canada are recalibrating how to best connect with customers to create a mutually beneficial relationship in the long term.

For Jarkko Turtiainen, business remains steady as municipalities begin to implement Cloudpermit's SaaS to digitize both internal and external systems and processes while COVID-19 has, paradoxically, created a bit of breathing room. “When you consider bigger cities like Vancouver or Toronto, the turn to digital can be very slow,” Turkiain-

⁹ C.D. Howe Institute. “Canada Entered Recession in First Quarter of 2020: C.D. Howe Institute Business Cycle Council.” Accessed August 13, 2020. <https://www.cd-howe.org/council-reports/canada-entered-recession-first-quarter-2020-cd-howe-institute-business-cycle-council>.

¹⁰ This corporate strategy was found to be consistent across the food processing and equipment production industries in Canada in a recent White Paper commissioned by Goldbeck Recruiting LLC entitled The Future of Our Food. See Goldbeck Recruiting. “The Future of Our Food: An Industry in Flux.” Accessed August 13, 2020. <https://www.goldbeck.com/employers/areas-of-expertise/future-of-food/>.

¹¹ Personal communication between Rose Agency and Sean Greenhill, August 2020.

en says. “You’ve got people working for the municipality for 25 years—they don’t want to be the one making that change.”⁷ But with the push to remote work and the necessity of procuring a robust SaaS to make this possible, municipal governments are taking digitization off of the back-burner and giving the implementation of new business procedures much more attention. This is also important given that the construction and manufacturing industries are faring moderately well throughout the pandemic response—having systems like Cloudpermit in place allows the approval processes for manufacturers, architects, and contractors to continue with industry processes

and applications without anyone in office to receive or approve documents.⁷

While there may be little innovation occurring throughout the industrial, commercial, and municipal construction and manufacturing sectors, therefore, companies are still working to refine and streamline processes and systems that can support successful business in a post-pandemic world.

DISCUSSION: SHIFTING THE FOCUS FROM NEW GROWTH TO LONG TERM CUSTOMER RELATIONSHIPS

The interviewees’ perspectives on

where to be the most generous with company attention is echoed by McKinsey,¹² and Deloitte: companies must make sure that relationships with customers outlast the pandemic.¹³ “What we know from an event like this is that some people will be afraid—and what we know is that when people are afraid they tend to make decisions that aren’t always going to serve them best in the long run,” says Todd Walsh.⁵ This sentiment is complementary to the realities of customer conservatism during periods of uncertainty—new clients may not want to engage a new product, contract, or software while trying to wayfind during the fog of the pandemic. This is where the interview-

¹²“Connecting with Customers during a Crisis | McKinsey.” Accessed August 13, 2020. <https://www.mckinsey.com/business-functions/marketing-and-sales/our-insights/connecting-with-customers-in-times-of-crisis#>.

¹³ Deloitte. “COVID-19 | Maintaining customer loyalty and trust during times of uncertainty.” Accessed 12 August, 2020. <https://www2.deloitte.com/content/dam/Deloitte/ie/Documents/covid19/gx-coronavirus-customer-loyalty.pdf>.

ees agreed: now is the time to focus carefully on existing relationships with long-term and reliable customers.

“You have to be really in tune with what the customer’s needs are,” says Kris Krol, an industrial sales veteran. “You have to be more than just someone trying to sell to them. You want to behave almost like a partner in their business, looking for solutions to help them save money and run more efficiently.”¹⁴

The cultivating of beneficial long term relationships, Krol says, is based in creating value for the customer—even beyond the parameters of a simple sale. “There’s an opportunity to support our customers even at

the back end of things,” Krol says, “You want to help customers find products and solutions which will give them more production value. These should be purpose-built solutions.”¹⁴

Sales managers should be working with their teams to ensure they’re adequately equipped to navigate these new territories. As Brooke Simmons wrote for Outreach, “this isn’t the time for your typical discovery or demo call.”¹⁵ Sales managers should be collaborating with sales teams to maximize internal sales, and to ensure that customers are feeling heard and respected. Perhaps even go so far, Simmons writes, as asking a potential customer how they’d like to pro-

ceed after an initial conversation.¹⁵ Now is the time to be demonstrating value rather than demonstrating product. How? By making sure that sales representatives feel comfortable and knowledgeable enough to be genuine and meet their customers on a neutral playing field intended to solve the customer’s problems.

This sentiment—prioritizing service over selling—was echoed by several interviewees, including nVent’s Bill Condon. “The best I can do is give as much information I can in a transparent way to the people that need it, and give them the tools to prepare their own business,”¹⁸ said Condon. Transparency—even when disappointing, for example, if

¹⁴ Personal communication between Rose Agency and Kris Krol, August 2020.

¹⁵ Outreach. “Selling in a COVID-19 World - 4 Immediate Steps to Take.” Text/html. Outreach, March 25, 2020. <https://www.outreach.io/blog/sell-in-a-covid-19-world>.

a product will not be available due to supply chain disruptions— provides the opportunity to prove corporate commitment to customer relationships. “If you can't fill an order, find someone that can,” Krol says. “Your customers will remember that you helped them keep operating, even if they weren't purchasing directly from you.”¹⁴ This ethos was shared by Walsh. “It may be true that you have to work harder for the same result but you're planting seeds for the future, so those are rewards you'll reap down the road,” he says.⁵

TREND: THRIVING CUSTOMERS HAVE BEEN QUICK TO ADAPT

In the industrial construction and manufacturing spaces, many sales

teams are finding their customers are thriving. The common thread, according to the interviewees? These customers have been quick to pivot production to serve spikes in demand brought on by COVID-19. “A few manufacturers are now involved with making plexiglass partitions,” says Kris Krol. “They've pivoted their typical product manufacturing composition to serve a public need, and by extension they've found a way to keep the machines running, and to avoid redundancies, while their typical customers are not placing as many orders as they were pre-pandemic.”¹⁴

For these customers, the most valuable sales relationship is like that which is discussed above. Pivoting production and manufacturing, especially quickly, requires

innovative thinking and strategy to surmount myriad obstacles as they appear. The best sales representatives, in this case, are able to aid customers in solving those problems. “It's been extremely valuable to get to know your customers' business in a fundamental way,” says Krol. “Because with that information, we can support them through our own networks.”¹⁴ When pivoting a manufacturing or automation operation, companies can run into supply chain disruptions or sourcing difficulties if there is no pre-existing supply chain agreement present to procure components required for the new operation. In COVID-19 manufacturing, think of the current shortage of hand sanitizer, isopropyl alcohol, plastic pumps, and plastic vessels for sanitizers. Krol's team has found success in situating the sales

team as a resource to make new connections. “When we’re meeting with customers, and we hear they’re dealing with a supply chain issue or they’re unable to procure parts, we’re able to connect them with our own contacts to help solve the business issues they’re having,” Krol says.¹⁴

In contrast, Sean Greenhill notes that some companies are simply refusing to adapt to the times. “While doing job interviews, I encountered one hiring scheme which required an in-person interview with the executive team,” he says. “Obviously, travel is out of the question—so the hiring process simply didn’t progress any further.”¹¹ Companies refusing to adapt, either in HR and sales hiring practices, or on the factory floor, are creating great risk to their employees and to the health and longevity of the busi-

ness.

Amir Kassaian of Beckhoff Automation Canada is finding that more and more companies are turning to automation in a post-COVID-19 world.⁴ Despite the reticence of some corporations to invest in high capital projects during a period of such uncertainty, those keen to adapt to the new realities of manufacturing and construction are eager to get started automating their workspaces. Automation increases efficiency, cuts down on human error, and above all, can limit the amount of employees present on the factory floor to encourage social distancing.⁴ In the case of breweries and distilleries, for example, turning to hand sanitizer production, Kassaian and his team have worked to create an efficient and safe workflow which has met much success. “With the production

and implementation of canning machines, for example, or filling stations, breweries are able to keep less staff on the plant floor,” he specifies. “This is the beauty of automation—good systems allow fewer staff to oversee and manage a greater variety of manufacturing processes.”⁴ Kassaian believes this trend towards automation amongst companies seeking to adapt their manufacturing processes in the COVID-19-era is here to stay. “Finding the right system can create huge efficiencies,” he says. “I don’t think this predilection is going anywhere, especially as we continue to see large corporations investing heavily in the automation process.”⁴

DISCUSSION: NEW SITES FOR SALES GROWTH

Corporations which have been quick to adapt their processes to

meet the needs of the times are those excelling—and the same is true for sales teams. “Sales teams have, similarly, been stuck in a holding pattern,” says Sean Greenhill. “The focus has been on preserving and fulfilling current business. But I think we’re approaching a point where we’re able to think strategically again. There will be a moment of innovation and acceleration, where sales teams learn to work a lot more efficiently, and that’s a moment that won’t come again.”¹¹ Being the first movers in a deadlocked industry, or an industry bogged down by slowing business, could be precisely what an industrial manufacturing or construction corporation needs to get ahead—by offering something new before anyone else, “there’s a lot of money to be made for firms that can be the first movers,” says

Greenhill.¹¹ This sentiment is echoed by Joel Brown. “There will be an opportunity in this business environment to do something creative, something different, and to see profit from that.”³ Whether this looks like finding a new way to demonstrate or test products with customers from a distance, or finding a new product perfectly suited to customers’ needs, now is the time that sales teams should be recalibrating how they operate to best create new leads and to formalize contracts with potential clients.

Amir Kassaian and Kris Krol, along with their teams, have expanded their offerings to encompass complementary value added services to ensure strong relationships with existing customers. “Proving your worth as a contact for your customers is what builds loyalty,” Krol says. “People say it’s about price, but for

most companies, it’s about great service. They’re willing to pay a bit more to have a more collaborative, solution-driven relationship with a sales representative.”¹⁴ For Krol, this strategy is manifested by cultivating a careful comprehension of a customer’s needs, and creating a tailored solution. “This might look like adapting our shipment schedules to meet a customer’s changing storage and inventory capacities, for example,” Krol says, “or building in a storage system and replacing or organizing tools, if that will create meaningful value for them.”¹⁴

For Kassaian, this value-added strategy has involved expanding his team’s reach in both directions of a customer’s supply chain. In a recent collaboration based out of Beckhoff’s Czech Republic office, the company managed and prioritized supply chain coordination of 500

ventilators per week. Normally, supply chain management is not the role of Bekhoff sales engineers, like Kassaian, but the customer needed to produce the ventilators quickly to get them to people who needed them, and Beckhoff took up the challenge. Finding new ways to serve customers that complement company offerings can create long lasting relationships and new sales. “In the case of automation, for example,” says Kassaian, “R&D is increasingly relying on processes like machine learning and machine vision. Introducing this sort of intelligence and automation into their processes can drastically increase efficiency.”⁴ This is especially true of oil and gas industries, he says. “The other thing about automation is that following

capital investments, the product can be improved by software updates—creating greater efficiency without a huge cost.”⁸

TREND: SALES TEAMS SHOULD BE LEANING IN

Despite slowdowns in industrial manufacturing and construction industries across commercial, municipal, and private sectors, sales teams should not be letting up. While the landscape of sales has certainly changed, sales teams must remain committed in order to succeed, and to forge new pathways through their respective industries. “Playing offense at a time when a lot of our competition may be retreating is valuable,” says Todd Walsh. “While our com-

petition is focusing on scarcity, we're taking on the opportunity and asking, how can we go to market and create value?”⁵

Rallying the team, especially from a distance, can be difficult for sales managers, but solidifying a cohesive vision, plan, and list of priorities for sales teams are integral to replacing the Monday morning meeting with Zoom calls and still seeing success. “It's crucial to make sure your team is forging relationships with decision makers—these might not be the same people they were before the pandemic,” says Kris Krol.¹⁴ Several of the interviewees stated concerns about connecting with both customers and staff via group Zoom calls, and about the sharp learning curve to

create engaging electronic materials and effective training and educational manuals.

But these are challenges that can be surmounted. Similarly, while Canada's real GDP fell a staggering 18% between March and April, this doesn't mean there's no business to be done—as discussed, many businesses are thriving.⁶ “There is an expectation right now,” Joel Brown says, “that we're all seeing a slow-down in our business. But this doesn't have to be true. Sales teams can still stir up work and be searching for new ways to connect with potential customers. Now is not the time to sit back.”³ Jarkko Turtiainen feels similarly. “Why do we need to slow down?” He says. “We've

made sure that our team and our customers are safe, and now we're back out trying to do what we do best.”⁷

CONCLUSION

The landscape of sales in the manufacturing, construction, and automation industries has changed profoundly since the beginning of 2020, with essentially a dissolution of the relationship-building practices sales teams have relied on for decades. Meeting face-to-face at all has at times been a disobedience of public health guidelines in Canada, let alone a trip to the golf course. Where some customers have faltered, others have capitalized and adapted to new needs and

have begun offering new product lines; successful sales teams have done precisely the same. Creating engaging digital offerings, collaborating with clients to develop purpose-built solutions, and creating a culture of connectedness and transparency throughout the industry have begun to yield fortified, loyal relationships. What remains clear is the opportunity for innovation and creativity at the level of sales teams and sales team management: it's only a matter of when, not if, a breakthrough in the trade will happen.

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