

# TOOLKIT – RESOURCES

## TELLING IS NOT SELLING: WHAT **EHS** CAN LEARN FROM SALES LEADERS

The following are resources to help you continue the work. **Good luck!**



**E-book:** <https://hsi.com/resources/how-to-calculate-a-safety-budget-that-gets-approved>

### How to Calculate a Safety Budget That Gets Approved

and the accompanying: **Safety Budget Worksheet** <https://hsi.com/resources/safety-budget-worksheet>

These resources can help you create a budget that management will approve, with practical advice and step-by-step instructions. It covers the following:

- Justification of the safety budget
- Considerations when creating the budget
- Aligning the safety budget with company goals
- Areas to allocate funds and categories to create in your budget

**Whitepaper:** <https://hsi.com/resources/6-steps-to-build-leadership-buy-in-for-ehs-technology>

### 6 Steps to Build Leadership Buy-In for EHS Technology

This whitepaper will help you understand how to convince the decision-makers to make the right workplace health and safety investments by:

- Identifying what leadership cares about
- Highlighting the financial benefits of safety
- Showcasing real-life success stories
- Outlining your existing risk
- Detailing a clear plan to move forward





**Whitepaper:** <https://hsi.com/resources/safety-is-everyones-job-organizational-collaboration>

## Safety is Everyone's Job: Organizational Collaboration

Whether you're a safety professional, HR professional, training coordinator, operations manager, CEO or supervisor, carrying the responsibility of your organizations workplace health and safety is an overwhelming yet important job. When you engage with other professionals across your organization and make safety truly "everyone's job", everybody benefits. This whitepaper reviews the five essential elements of comprehensive workplace health and safety programs and identifies opportunities for collaboration and communication across your organization.



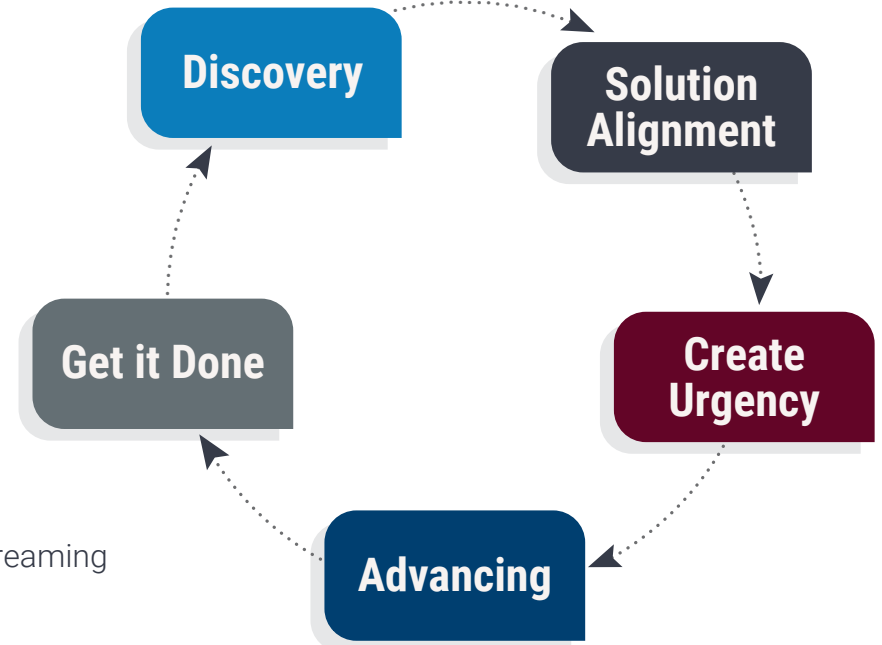
**The five steps in the sales process** covered in the presentation represent ONE way to "sell" effectively; it is not THE way and there are many other sales techniques and methods out there you can research and learn about. We focused on this one as it's more about ongoing relationship sales and is therefore more applicable to the EHS professional relationship with leadership.

### Step 1 – Discovery:

The goals of this stage are to understand the other person's perspective and build rapport. For a relationship that is ongoing vs. one-time only sale, the relationship and trust are important (think contract with your TV provider/streaming services vs. buying a TV).

### Step 2 – Solution Alignment:

Take what you learned during discovery (pain points, priorities, current issues) and align the solution to their needs. Build a business case for the solution, this might entail budget, value/ROI (return on investment), and how this solution aligns with business goals. It's important to understand not just straight cost (monetary) but also perceived value of solution.





### Step 3 – Create Urgency:

This step answers the question: How do we make this the next thing?

When creating urgency, it is essential to base this around what is important to the person you are speaking with. Ideally from what has been uncovered through discovery.

In many scenarios this urgency is going to be quite clear... “If we don’t rectify {problem/pain point} by {identified timeline}, then {negative result} will occur.” or “if we implement {this solution}, then {positive result} will occur.” However, it is not uncommon for a clear “if-then” relationship to be hazy. Then we must get creative to boil down to pain points relevant to the individual.

### Step 4 – Advance the Sale:

After completing the first three steps, we can make the mistake of being too polite and believing the other person is as invested and committed as we are and will follow up.

Always follow-up with other person, you own the process and relationship, waiting for the other person to get back to you doesn’t work. If they are coming to you asking, “what’s happening with this project?”, it weakens the importance and urgency of your solution.

Sales is used to hearing NO, that is often the start of the conversation, not the end. Persistence and not giving up are important, however you need to find a balance between being helpful vs. annoying.

### Step 5 – Get it Done:

Most sales processes end with “closing” as the final step. You may have heard of the ABC’s of sales; Always Be Closing. In this scenario, closing = getting it done. Since this is an ongoing relationship, and unlike the salesperson at Best Buy who sells you a laptop, you and your boss see each other every day at work. **Think of step 5 as connecting to step 1, it’s a loop.** Successful completion of this ask/project paves the way for the next ask, and step 1. As you implement your solution successfully, you are building rapport and trust for the next ask/solution/issue.

Once you get commitment and “close the deal”, time to implement and prove the business case is true (save money, time, costs, improve safety, health, quality, etc.). **Every success helps pave the way for the next ask and next 5 steps.**