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Halliburton: Combining Passion and Process for Sales Results

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Peter Bernard is senior vice president of business development for Halliburton Co., the \$13 billion Houston-based energy services giant.

Today, Bernard heads what he describes as a “very complex global sales organization” in Halliburton’s energy-services division, a premiere player in a volatile, highly competitive industry.

“These days, people hear that the oil and gas companies are making a lot of money and, yes, right now that’s true,” says Bernard, who has worked in the oil and gas sector since 1980. “But as everyone knows, whatever goes up, always comes down. We’re in robust times right now, but throughout my career, I’ve seen a lot more of the bear market—probably 75 percent of the time—than the bull market.”

Passion—and Ongoing Sales Success—Critical For Delivering Results

Meanwhile, as a publicly held company, Halliburton is keenly aware of its responsibilities to shareholders, who expect results in any environment.

“So we have to be passionate about the results on a daily basis, a weekly basis, a monthly basis,” says Bernard, who oversees a 1,500-person global sales force. And that genuine enthusiasm must start at the top: “The key to driving behavior in an organization depends on leaders who wake up every day passionate about what they’re going to be doing.”

But, he adds, passion alone isn’t enough. Ongoing sales success—which, in Halliburton’s case, is measured in billions of dollars annually—requires the right processes as well.

The Birth of a Sales Process Initiative

Of course, Halliburton has always had its own sales processes. But it was a former long-time Halliburton sales representative and manager who convinced Bernard and other sales executives that revamping the sales organization’s approach could generate some pretty dramatic results.

Mickey O’Callaghan had worked for Halliburton for 21 years—18 of them in progressively responsible sales positions. When he made a career change, he moved to

a large energy company that happened to be a devotee of Miller Heiman’s sales processes.

In retrospect, “I thought I’d have been a better account rep and sales manager if I’d had those tools in my sales tool box when I was at Halliburton,” O’Callaghan says. So he left his other job, and returned to Halliburton—this time as a Miller Heiman sales consultant, convinced that Miller Heiman’s sales processes and tools could provide a competitive edge for his former employer. And Bernard agreed to try the new sales approach.

5 Steps to Sales Process Adoption

Bernard describes sales process adoption as a simple framework and says that when you deal with a sales force, particularly a large, multi-national, diverse sales force, you can’t be too complicated about it.

1. Clearly communicate tasks and objectives. Goals and objectives must always be realistic, clearly articulated, and easy to understand. Further, your communication must be transparent and permeate the entire organization.

2. You must have passionate people, leading and supporting the change. And, you must have clear ways of measuring and training your people for them to be successful. Good, simple, targeted processes achieve the right results. You can give salespeople the tools but if they’re not driving to win, your organization will not achieve the results you need.

3. When salespeople do well, reward them. When they don’t, explain the situation and what they have to do to get results for the next level.

4. Benchmark your organization’s progress with clear measurements and measure the important things. Understand your market position. Bernard says, “We have thousands of products and services within our organization, and we’re selling in many different countries. We break it down by customers, competition--every different aspect of it. You’ve got to know that data to track your success. We measure and analyze everything.” For example, we include new technology and pricing initiatives, and measure a whole lot of other factors that are important to drive those two objectives as we continue to grow our revenues and margins. You may measure more than you show, and you may talk about those results - but show only what’s important to benchmark your progress.

5. Lastly, and very importantly, it’s essential to celebrate and analyze wins--and understand losses. Make sure everyone learns from both the wins and losses and that the

knowledge from those experiences is incorporated back into the sales process.

“People used to hate to talk about losing, but we created a culture of open transparency where no one got beaten up for losing work. We talk about it and we analyze it, and they never want to lose. But at the end of the day, you learn as much from a loss as you do from a win. Not only do we want to make sure that everyone doesn’t want to lose, but that salespeople always want to figure out how they can be winners,” Bernard says.

Mandatory Change to a Common Sales Process and Language

Halliburton began rolling out the new sales process globally through online training and through instructor-led sales manager workshops. Bernard required business development employees to pass the *Strategic Selling*[®] sales process training with 100 percent accuracy before being allowed to attend the Business Development Academy, Halliburton’s premiere annual sales event.

“Peter wanted to know that the sales reps and account managers coming to the next Business Development Academy were going through the new sales process training before they got there, because he wanted to make the new process a core part of the academy activities,” O’Callaghan says.

The challenge was to provide initial sales process training via online programs to hundreds of Halliburton reps located globally in different countries, many very remote. Miller Heiman’s web-based program, supported by Halliburton’s learning management system, allowed this to be accomplished with few problems. The online training was customized to include Halliburton’s products and services, role plays and case histories.

Those efforts helped resolve another issue: unifying a veritable Babel of cultures stemming both from Halliburton’s having account reps all over the globe and assimilating sales forces from its acquisitions of other companies. “Peter clearly understood the benefit of having a common sales process and language,” O’Callaghan says. “He understood the efficiencies and benefits that would be gained.”

Online training evolved to classroom training which afforded participants the opportunity to exchange best practices, work on deals together and explore ideas. Ultimately, Halliburton utilized internal instructors who are experts in the business and certified in the sales process—thereby ensuring continued adoption and implementation across the global business development organization.

Executive Sponsorship Leads To Change Adoption

In fact, Bernard’s wholehearted commitment to the implementation of a sales process was essential to its division-wide adoption. “With Peter, there was no question about where he stood: ‘This is the process. This is what we’re going to do. You’re expected to learn it, use it and move forward with it,’” O’Callaghan says. “He has vision, he has direction and he will make a decision. His leadership role was critical to the overall success.”

Bernard agrees and stresses the importance of strong executive sponsorship, citing the roles of his peers and other top managers. “They stand up every day and continue to reinforce what’s important,” showing leadership not only to the sales organization but the rest of the company as well. “You need passionate people: If you don’t have the right people in the organization, you need to move them out,” he says.

Asked what specifically drives his dedication to the change initiative, Bernard simply cites the Miller Heiman approach. “I made the decision to move forward with it and introduce it as a standard because it’s a simple process that drives people to ask the right questions and understand what needs to happen,” he says. He describes the processes as “robust and meaty, yet straightforward.” He adds: “They’re targeted. They achieve the right results.”

Pilot Project Produces Metrics

Bernard first observed those results in a small pilot project. “We put the techniques to the test with one of our local sales groups. I had them report back to me. They didn’t have to have the right results: Whatever they were, they were.” Ultimately, those results were impressive. “The amount of money that we garnered from three strategic targeted opportunities paid for the Miller Heiman system worldwide many, many, many times over,” Bernard says. “And that was from three sales.”

The big-picture results are even more impressive. “Since we introduced this in 2004, we’ve had a 30 basis-point price increase for the same services we sell,” says Bernard. “As a company, we’ve grown our market over 20 percent [in aggregate] over the last two or three years. Our target next year is \$15 billion in sales”—or between \$1 and \$2 billion per month.

The foundation for hitting those ambitious targets: the right combination of passion and process, backed by strong executive sponsorship.