

CHAPTER

1

# Selling and the Generations

## Making a Connection

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**A** customer's decision to buy is usually about 85 percent emotional and 15 percent rational. In a crowded marketplace with many buying options, the typical consumer spends as much time deciding from *whom* they will buy as they do deciding *what* they will buy. Consumers make the emotional part of their choice based on two qualities that they find (or don't find) in a sales professional: likability and respect. Respect comes from vendors' knowledge of their products, services, and industry, as well as from their experience and accomplishments. But likability can be more elusive, even for the friendliest and most outgoing account executive. It's one of those things that just seems to "be there" with some people and not with others.

A big part of successful selling is the likability factor—one's capacity to consistently establish a connection or rapport with prospects, clients, and customers. Clients need to establish a level of comfort with us before they trust us with significant purchase decisions—or even before

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they will believe anything we say. That comfort level is expressed in phrases like "He gets me" or "She just knows exactly where I'm coming from" or even—if we're really lucky—"Hey, I *like* this guy!" Sometimes, establishing this connection is easy. We just "hit it off" with a client, especially one with whom we share a common background, age group, or interests. Other times, however, it seems

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more difficult. We can't seem to find the right "wavelength," or we aren't even "speaking the same language." This happens most often with customers who are of different ages and backgrounds than our own.

While this is frustrating it's also completely normal. It is human nature to sell and communicate based on our own

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perspectives. We often assume that if we like something for a certain reason, then everyone else probably does, too. If we prefer to learn about and buy products in certain ways, then we assume that most

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others share those preferences. However, your own perspective and preferences may not always be a good match for your sales prospects, especially when you come from dif-

ferent backgrounds. And today's marketplace is made up of people with various ages, experiences, and personal histories. The marketplace is more diverse than ever, making it highly unlikely that you can just sell to people like yourself. You are selling to everyone. In fact, to be successful, you must be able to connect with and sell to people who are nothing like you. And that means different value sets, different communication preferences, and different selling points.

No one can be all things to all people. Nor can a sales professional expect to be every client's best friend. But if an account executive can earn a little likability, it will go a long way toward accomplishing some key steps in the sales process. Likability helps you:

### Making The Connection

Get them to listen.  
Establish a relationship.  
Don't turn them off.  
Get the last look.

- *Quickly connect.* Get the client to “lean forward” to at least listen to what you have to say.
- *Establish a relationship.* Help the customer feel comfortable enough so that you can communicate about what he or she really wants.
- *Avoid turning them off.* Avoid inadvertently saying or doing things that make them uncomfortable.
- *Earn the last look.* Ensure that the client comes back to you at the end of a competitive process to give you the last chance to make the sale.

Understanding and being sensitive to a client's background, biases, and preferences—and then treating them appropriately—will go a long way toward achieving these likability goals.

**Do:** Try to understand how customers' backgrounds affect their buying preferences.

**Don't:** Assume all your customers prefer to buy the same way you do.

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### Generational Differences

One of the main factors that differentiates today's consumers, and may be separating you from your customers, is generation or age group. We all see the world through our own generational filter. Each generation has a shared history, common biases, and core beliefs. The experiences of our youth shape our points of view. Moreover, our age and our life stage also dictate some of our needs and preferences. In some cases, the differences between generations are minor, while in others, they could prevent you

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from closing a sale. Many of the things that will help us "get" our clients come with our ability to understand their generational points of view.

Often, our failure to connect with clients—to understand "where they are coming from"—lies in our inability to understand their generational background.

We need to understand how to sell across generational divides rather than allowing these differences to short-circuit that crucial connection to provide the best service to our clients. Appreciating generational dynamics provides a way for you to find common ground with clients from all generations and present the information they want in the manner they want it. Whether you are selling financial services, home appliances, cars, or smartphones, generational preferences can make a difference. Understanding clients' age-based points of view is an indispensable soft skill that you can use to establish the connection and make the sale.

## Generational Fact

Surveys and market research have shown that different generations have very distinct views about products, politics, religion, careers, and just about everything else. Generation is one of the most important factors that shape people's opinions and views.

We're all familiar with the typical traits that separate generations, such as hairstyles, vocabulary, music, and clothing. Others, however, are not as easily identifiable, especially when it comes to their behavior as consumers. For example, some generations are inclined to take sales professionals at their word; others won't believe a word you say. Some are impressed by professional credentials, while others are turned off by them. One generation usually wants standard offerings. Another wants everything customized. Still another wants to know that you have a Plan B ready in case Plan A doesn't work out. Each of these approaches has a distinct generational appeal, and we need to know when and how to use them.

Sending the wrong generational signals can significantly alienate clients. Sales techniques that are effective for one generation may come off as "pushy" for another, whereas approaches that work with older generations may identify you as

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“like my parents” for younger customers. Methods of communication that seem normal to you might be perceived as intrusive by members of a different age group. These are all examples of potential generation gaps in the relationship between you and your clients that could cost you a sale that you are otherwise well positioned to make.

### The Four Generations

Generational differences are more significant in marketing and selling now than at any time in our history. For one thing, there currently are more generations alive and active than ever before, as modern medicine and affluence have produced a revolution in longevity. People are living longer than they ever have, and are remaining healthy and active much later into their lives. They are working past traditional retirement age and continuing to be active consumers into their 70s and 80s. To illustrate this with one statistic, consider that the fastest-growing population segment today is 85 and over!

Because our modern world has changed so quickly and in so many ways, each successive generation has had a significantly different experience growing up. Coming of age in the 1940s was totally different from growing up in the 1960s which, in turn, was nothing like growing up in the 1980s, which was completely dissimilar from the 2000s. This has resulted in four generations with four very distinct experiences—and vastly unique generational personalities.

Finally, the importance of younger generations in the marketplace has grown significantly over the years that span these four age groups. While young people had little or no

## Generational Fact

The four generations in today's marketplace are:

**Matures:** Born before 1946

**Baby Boomers:** Born between 1946 and 1964

**Generation X:** Born between 1965 and 1979

**Millennials:** Born between 1980 and 2000

spending power or much influence on purchasing decisions 60 or 70 years ago, younger generations today have more influence and disposable income. Teens and 20-somethings are very active consumers in almost every market; and they are among the leading consumers in some cases, such as mobile technology. They also wield tremendous influence over the spending habits of older generations in their circle of family and friends. These youngest consumers—who at one time participated in the marketplace only in a limited way or through their parents—are now as active and influential as any other generation, and in some cases, even more so.

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So what does all of this mean? In short, that the marketplace's landscape has changed significantly just over our lifetimes. For the first time, we have four distinct and important generations of consumers to whom we must market and sell. This means that it's now more important

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than ever before for sales professionals to understand the following four generations in today's marketplace:

- Matures: Born before 1946
- Baby Boomers: Born between 1946 and 1964
- Generation X: Born between 1965 and 1979
- Millennials: Born between 1980 and 2000

Each of these generations has shared experiences and characteristics, and each presents distinct challenges and opportunities to sales and marketing professionals. Specific selling tactics are effective for each one. Of course, generational biases are not ironclad, and birth date does not dictate personality. Many factors and influences comprise a consumer's makeup. Naturally, professionals who are involved

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in marketing and sales must first develop a thorough knowledge of the products and services they offer, an understanding of their industry's competitive landscape, and a solid grasp of marketing and selling principles. But even well-equipped account executives, managers, and

sales professionals can be handicapped by a lack of generational insight. The fact is that the generation of which you are a member makes a difference for you, both as a sales professional and a consumer. And recognizing and understanding the differences between generations can be a very effective tool for the sales professional.

The study and definition of these generations is part of the study of demography, or population trends. Demographers and market researchers have always analyzed and labeled different generations, often marked by a large increase or decrease in birth rates over a period of time. We are particularly interested in the last four generations of the twentieth century for two reasons:

1. These four represent very significant population shifts with deep and long-lasting effects on society and commerce.
2. All four are still alive and active in our society and, therefore, active in the marketplace. In other words, they are all potential customers.

Developing an understanding of each of these generations and their differences is essential to a professional's toolkit, especially when it comes to selling and marketing across generational lines. We'll describe each generation in detail later in the book, but let's take a quick look at each of them:

**The Matures:** Born before 1946, the Matures are really a composite generation of several groups, all born before the end of World War II. These include the Veterans, also known as the Greatest or G.I. Generation (born before

### Generational Fact

The Baby Boomer and Millennial generations are the two largest generations in American history.

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1925), and the Silent Generation (born between 1925 and 1945). These generations have played important roles in our history and are known for their sense of sacrifice, patriotism, and duty. Almost all Matures have reached

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retirement age today. However, due to increases in life expectancy, they are much more active in the marketplace and the workplace than previous generations were at this

stage in life. There are about 40 million Matures—also known as Traditionalists or Traditionals—in the United States in 2011.

**The Baby Boomers:** Born between 1946 and 1964, the Baby Boomers get their name from the remarkable “boom” in the birthrate following World War II. Over 76 million American children were born during that time. As this exceptionally large generation has moved through each life stage, it has reshaped ideas about youth, educa-

*Baby Boomers are known for their optimism, self-confidence, and ambition.*

tion, work, and aging. Baby Boomers have always had a sense of their generation’s uniqueness

and importance. They maintain a lifelong connection to their youth in the 1960s, a time of momentous cultural and political change. Baby Boomers are known for their optimism, self-confidence, and ambition. Their numbers have been supplemented by immigration, and they now total nearly 80 million Americans. Until the emergence of the Millennials, Baby Boomers were considered the most important demographic in commerce, marketing, and sales.

**Generation X:** Born between 1965 and 1979, Generation X was originally known as the “baby bust” due to the decline in birth rates that resulted from birth control’s wide availability during the 1960s. They get their name from a novel about the generation that was published in the 1990s. Gen Xers grew up with less economic and family security than the Boomers, often in households with divorced or two working parents. The previous generation’s optimism gave way to the scandals, inflation, world crises, and recessions of the 1970s and 1980s. Xers are thus known as skeptical, cynical, and pessimistic. Despite being labeled “slackers” in their youth, Xers generally shoulder the responsibility for their own well-being. The advent of the personal computer and Internet during their youth made them the first tech-savvy generation. They number about 60 million in the United States today.

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**Millennials:** Born between 1980 and 2000, Millennials were originally known as the “Echo Boom” because they represent a surge in the number of births that came mainly as a result of the Baby Boomer generation having children of their own. They have lived for most of their youth in a time of broad economic and technological expansion. Indeed, ease with technology and telecommunication is one of the hallmarks of Millennials, along with a sense of optimism and entitlement that comes from growing up in an “everybody wins” world that their very attentive parents carefully structured and programmed. Millennials are also known for their sense of social and environmental responsibility, their responsiveness to peers and trendsetters, and their

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### Generational Fact

*Demographics* is the study of population trends that market researchers use to find target markets for products and services. Demographers identify and define age groups by their characteristics and preferences and identify them with generational labels.

consumption of new media. They number about 85 million in the United States and are beginning to eclipse Generation X

*They number about 85 million in the United States and are beginning to eclipse Generation X in spending power.*

in spending power. They are sometimes also known as Generation Y, because they are successors to X, or Generation Next.

You may already notice some differences in this brief introduction. It is immediately clear, for instance, that some

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generations are much larger than others. Substantial increases or decreases in birth rates and surges in population are part of what defines generations. The large size of certain generations, like the Baby Boomers and the Millennials, is what makes them so influential in the marketplace.

Another significant difference between generations is wealth. Older generations are the richest because they have spent a lifetime accumulating wealth during a time

of increasing prosperity. However, since younger generations grew up during that same time of prosperity, they are more accustomed to affluence—even if they didn't have to work for it. That affluence has allowed these younger individuals to stay young longer. They've been able to put off adult decisions like marriage, children, and careers until they are well into adulthood—much later than their counterparts from older generations did.

These broad demographic factors like size and wealth are some of the elements that shape each generation's attitudes, as well as some extensive differences in each one's outlook. For example, older groups tend to be the "We" generations who are more oriented to the needs of their society or team—whether it's their colleagues, family, community, or country. The younger generations are more "Me"-centric and focused on individual needs. The "We" generations grew up in times of struggle, hard work, and competition, while the "Me" generations came of age in kinder, gentler times of affluence. From the oldest Mature to the youngest Millennial, almost everyone in the marketplace today fits somewhere on this "We to Me" continuum.

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Other important features that shape generations are the formative experiences that each generation experiences as they come of age. Matures always remember the struggles of the Depression and World War II, whereas Baby Boomers were brought up during the Cold War and came of age during the tumult of the 1960s. Generation X was often left on its own—by parents' divorces and economic necessity—and

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### Generational Fact

#### Factors that Shape the Generations

- **Formative experiences:** Major events and developments they experienced growing up.
- **Life stage:** Their current age and the phase of life they are going through today.

was disillusioned by scandals like Watergate and disasters like the *Challenger* space shuttle. Millennials were raised during the tech revolution and prosperity of the 1990s, but had their security threatened by events like Columbine and 9/11. These kinds of episodes tend to stay in a generation's memory and shape its members' personalities over a lifetime; they can make it more cautious or bold, optimistic or skeptical, thrifty or extravagant. All of these characteristics help determine each generation's behavior in the marketplace.

Finally, an important part of each generation's personality is its current life stage; in other words, how old they are and how their age affects their lifestyles. Matures, for example, are over 65, so many are retired. They have accumulated a lot of wealth from a lifetime of work in a prosperous time, but may be inclined to preserve their resources for retirement and medical expenses, or for their heirs. Baby Boomers now range in age from their 40s to their 60s, and many are in the prime of their careers as executives and decision makers. Some younger Boomers especially are now "sandwiched" between caring for their children and their aging parents. Members of Generation X have settled into career and family life, are buying homes, and have several decades of

prime earning years ahead. Millennials are in college and early careers and are just beginning to start families. Each life stage entails certain responsibilities and lifestyles that affect how each generation behaves as consumers.

While demographics, formative experiences, and life stage are some of the key factors in determining a generation's character traits and tendencies, this is not to say that they determine every individual member's personality. Everyone is born with his or her own DNA, none of which is determined by generation. Obviously, it's also possible—and almost guaranteed—that any two people from the same generation can have different experiences and outlooks. For example, someone born in 1964 is likely to have a very different upbringing than someone born in 1946, even though they are both technically Baby Boomers. However, using some basic sociology and common sense, it is definitely possible to observe and draw some general conclusions about the characteristics of each generation that will apply more often than not. And with some basic knowledge about each generation's characteristics and attitudes—combined with some common sense—we can apply this insight to marketing and selling in ways that improve our performance.

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## Generational Insight for Selling

The first step in applying generational tactics in selling is to learn about the generations by becoming familiar with each

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one's characteristics, likes, and dislikes. This basic working knowledge will help you begin to tailor the appeal of your company, product/service, and yourself to fit each generation to whom you sell or want to sell. This book will provide you with a basic snapshot of each of the four generations to assist you in learning each one. These snapshots will arm you with the knowledge you need to identify and recognize each generation in the marketplace and choose the most appropriate generational marketing and selling tactics.

The next step is recognizing these generational characteristics in your customers—insight that you can apply in two ways. One is very broad and poses questions like: From what generations are your customers? What generations do you want as your clients? Does what you say about yourself, your organization, and your products and services convey the right generational messages to the clients you have as well as the ones you want? The second application is more specific, and requires that you consider things like: From what generation is the customer standing in front of you? Of what generation is the customer you are about to call a member?

Sometimes it's easy to answer these questions. You'll realize when you're addressing broad matters about your product or service's appeal that certain items are clearly more attractive to certain generations. For example, offerings related to retirement have obvious appeal for older generations, whereas the natural market for items like video game gadgets are younger generations.

However, many products are not restricted by generational appeal, or at least they shouldn't be. Some, like financial services and appliances, should interest all generations. And there are still other cases in which items are associated with one generation or another, but really should

not be limited to those markets. For instance, while retirement savings companies are usually associated with older generations, young people can—and should—be concerned about their retirement, too. By the same token, we often think of smartphones as toys or gadgets for the young, but their use among older generations is expanding rapidly.

How can you get more information about your business's generational appeal? One easy way is to take advantage of resources that are accessible to everyone. Market

research is available for almost every category of product and service, and is even broken down by age or even generational category in most cases. Organizations like Nielsen and Forrester conduct research for a variety of industries, and often publish their results in press releases or articles that appear in popular magazines like *Forbes* or *Advertising Age*, or on Web sites

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like *MartketWatch.com*. In other cases, industry-specific research is available in trade journals, or through trade or professional associations. Groups like the National Association of Realtors or the National Auto Dealers Association, for example, regularly conduct such investigations and make them available to their members or sell it to interested parties. Even data available through the U.S. Census or survey groups like Pew or Gallup may be relevant to your industry.

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### To Do

#### **Some quick and easy generational market research:**

1. Conduct an Internet search for surveys and research about your industry that breaks consumers down by generation.
2. Consult your industry's trade publications and professional and trade organizations.
3. Compile age data on your customers from your company's existing paperwork on them (if you have it).
4. Solicit generational data on customer feedback, mailing list, and promotional giveaway forms.
5. Commission a survey from a market research firm.

Finding existing generational market research has gotten a lot easier in recent years thanks to tools like search engines and the World Wide Web. Often, simple searches using sites like Google or Bing will turn up current market data relevant to your business. You can simply type your product, service, or industry's name into the search box along with another key word. For example, if you search for "financial services Baby Boomers" you will find many Web pages that address Boomers' interest in financial services. Even better—click the "News" tab of Google or Bing to see recent stories, news items, and press releases that mention Baby Boomers *and*

financial services. You may have to scroll through a few Web pages to find what you are looking for, but you can quickly narrow the results by adding the words *survey*, *market research*, or *poll* to your search—as in *baby boomers financial services survey*. This will lead you to some data you can use in many cases. You can then try it with the names of the other generations. While it may take some time to enter the various combinations of search terms and scroll through the results, the potential benefit is 100 percent free market research. Following these sorts of surveys and polls will also allow you to detect changes in the marketplace as the generational personalities evolve over time.

If you cannot seem to find what you need to know from Internet searches, trade publications, and professional associations, you can easily create your own generational market research. If appropriate to your needs and budget, you can simply commission some generational market research from a consultant or firm that specializes in just that. The Market Research Association ([www.mra-net.org](http://www.mra-net.org)) and similar organizations can provide you with a list of reputable companies that provide such services.

In many cases, a simpler and cheaper approach will do just fine: just do it yourself. Use some straightforward techniques to gather data from your customers or clients. After all, who better to provide data about your clientele than your current customers themselves? In fact, you may already have existing age data for your customers in paperwork that simply needs to be analyzed and categorized. If not, just request generational data from your customers in the course of doing business with them through techniques and occurrences like:

- Feedback and comment forms
- When gathering typical data at the point of sale

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- When collecting data for mailing and e-mail lists
- On customer information forms
- Through promotional giveaways

Unless it is absolutely necessary for your particular business, it is best *not* to ask for your clients' birth dates.

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Privacy and identity theft concerns make that seem too intrusive. It's probably best not to ask them their specific age, because as we

know, many people are sensitive about revealing that, too. The best way to gather this information is to include a list of age ranges for them to select from, like this:

### Age Range

- 19–31
- 32–46
- 47–65
- 66 and over

This will tell you exactly what generation they fit into without having to ask for too much personal information. Of course, you should update the age ranges as these groups age over time—the dates here are accurate as of 2011. Then, when you've collected a decent number of responses, you will have your own generational market research!

Once you know who your customers are—and, just as importantly, who they aren't—you'll be able to use your generational knowledge to best position and portray your business to reach the markets you want. Of course, target

marketing, product positioning, and image are usually the marketing department's concerns, while we are primarily concerned with selling tactics here. However, you will want to be sure that the way in which you market your products and services puts you in a position to sell them across generational lines. And at a minimum, you want to know to whom you are selling and you could be selling. Some basic market research and generational positioning will create opportunities for sales. Later in the book, in the chapters on each generation, we'll show you how to position and portray your business for each of them.

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The other component of identifying your clients' generations has to do with recognizing the generational characteristics of the customer who is right in front of you in a potential sales situation. Again, it may be easy in some cases. You may already know their age, since it might be on a form they have filled out or simply something they mentioned. It might be fairly obvious when meeting someone to get a rough idea of what generational category he or she fits into, while you may not be sure in other cases. Many people look and act younger or older

*Many people look and act younger or older than they really are.*

than they really are. Of course, the *last* thing you want to do is to start a conversation with a sales prospect by asking how old they are—or assuming that you know! When you are unsure, you can use some clues to select the appropriate generational approach. Let's say you are meeting with a youngish client but can't really figure out if they are Generation X or Millennial. Does he have tattoos, or is she

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**Do:** Use your generational knowledge along with the customer's visual, behavioral, and verbal clues to select the appropriate generational selling tactics.

**Don't:** Ask your client's age or birth date, unless there is a valid business reason to do so. Older clients may feel sensitive about the issue, and younger clients will see it as an invasion of their privacy. And never assume that you can "tell" how old a client is.

constantly sending text messages? If so, it's probably best to go with the Millennial approach. Or perhaps you are visiting a client who could be a Boomer or a Gen Xer. Does he or she have a wall of plaques and certificates? Go with the Boomer tactics.

Finally, if the visual clues don't give away a customer's generation, you might be able to ask a couple of questions during your conversation that will tell you what you need to know. Questions like "Should I call or text?," "Are you on Facebook?," or "Do anything interesting last weekend?" might give you the hints you need to adopt the right generational approach. In this book, in the segments on each generation, we'll provide the keys to the visual, behavioral, and verbal clues that will steer you in the right generational direction.

### Generational Selling Tactics

Once you know who your customers are in terms of their generations, you can begin to use generational selling tactics.

This approach simply entails the things that you say and do during the sales process that put your clients at ease and make them comfortable with you—methods that help you to make the connection. In some cases, knowing a client's generational biases will help you choose from among traditional selling tactics. For example, should you emphasize the sizzle or the steak? Should you push this sale toward a close or should you back off? A customer's generation will help answer these questions for you.

There are specific generational approaches in other instances that are effective. For example, Matures will feel reassured and comfortable if you show them your credentials, awards, and positive reviews, whereas Gen Xers will only feel reassured when you show them a clean criminal background check and your company's audited financial statement. While that's probably a bit of an exaggeration, the very real point is that each approach will have a very different effect depending on your customers' generations. You want to know with whom you are dealing and choose the appropriate openings and closings and keep things smooth in between.

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In the chapters ahead, we'll provide you with a clear snapshot of each of the four generations. These snapshots will walk you through each generation's experiences and mind-set. We'll cover them in order of importance to the marketplace, starting with the biggest spending generation, the Baby Boomers, followed by the largest generation, the Millennials. Then we'll cover the generation that is just now entering its earning peak, Generation X, and finally the generation with the highest per-capita net worth, the

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Matures. What are their characteristics, likes, and dislikes? Why are they important? How do you recognize them when you meet them? What, when, where, why, and how do they buy? These chapters will help you learn the generations so that you can choose appropriate tactics for each generational selling situation.

In the chapters that follow each generational snapshot, we will give you some hands-on selling tactics for each generation. What do you need to do and say to make a connection with each generation of client? What should you *not* do and say? How does each generation prefer to communicate with sales professionals? What are the best approaches to closing the sale with each generation?

Arming yourself with a working knowledge of the four generations—and the best selling tactics to use with each—will give you a competitive edge in some key areas of selling, especially in establishing and maintaining a relationship and a comfort level with your clients and customers. That

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edge might earn you the last look or opportunity for a sale—or even the sale itself. And it just might earn you some loyal repeat customers and some glowing referrals. Those are the benefits of generational insight that no sales professional should be without.