

# CHAPTER 1

# THE EMERGENCE OF THE

# TRANSFORMATIONAL

# SELLER



*Figure 1.1: Transformational Selling Model*

## 2 BRYN THOMPSON & STEVE LOWNDES

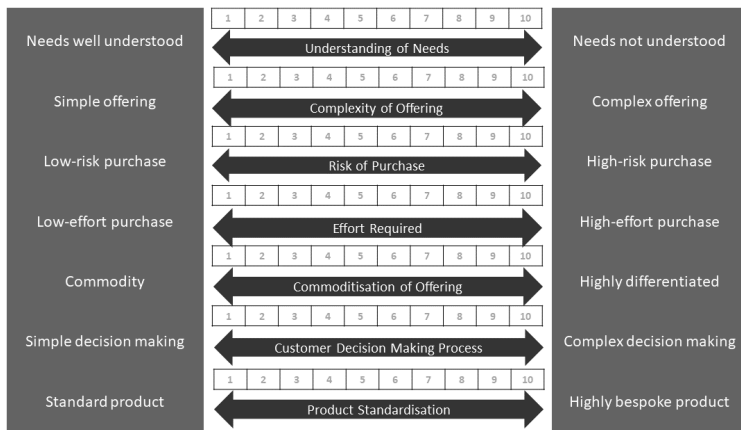


Figure 1.2: 'The 7 Conditions for Selling'



Figure 1.3: The Transactional to Transformational Spectrum

# CHAPTER 2

## THE BEHAVIOURS OF THE TRANSFORMATIONAL SELLER

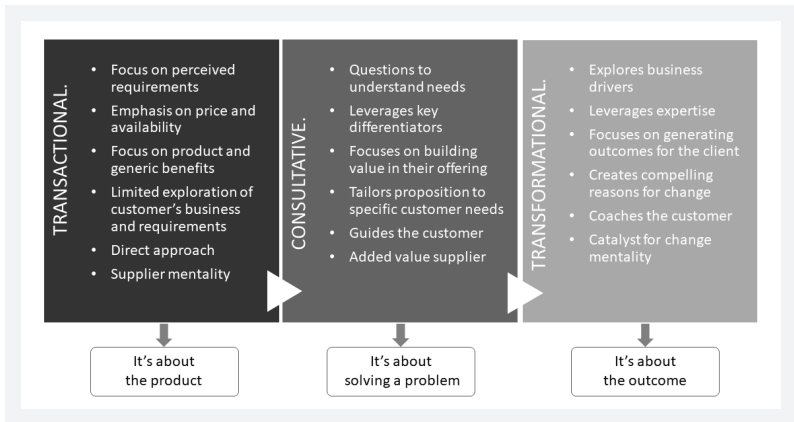


Figure 2.1: Transactional – Consultative – Transformational Behaviours

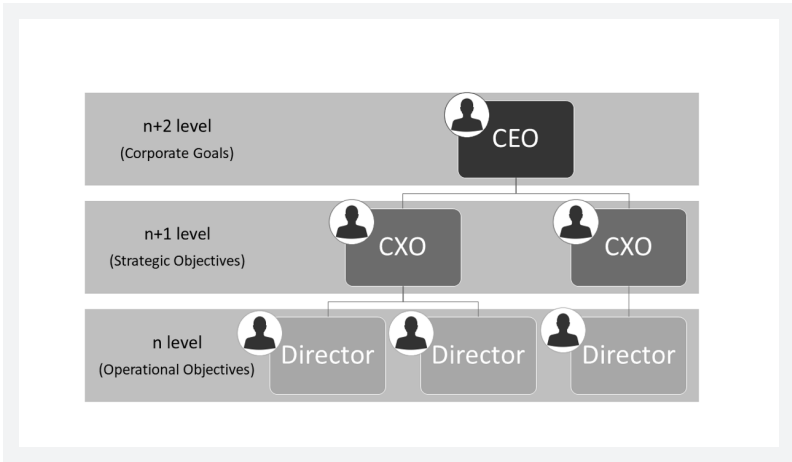


Figure 2.2: Hierarchy of Objectives ('n' being the key contact)

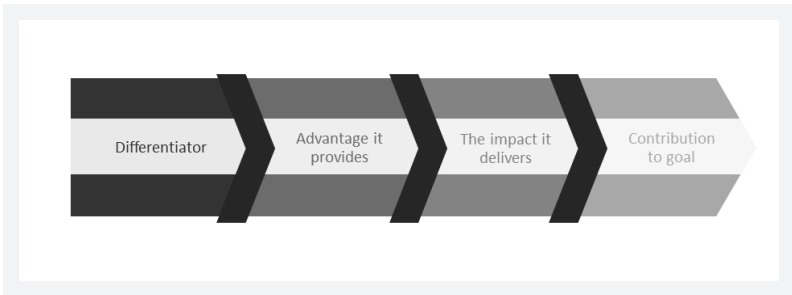
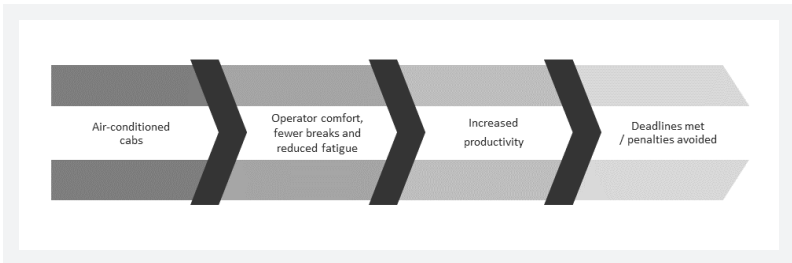


Figure 2.3: Value Chain Linking Differentiators to Outcomes



# CHAPTER 3

# THE CUSTOMER BUYING JOURNEY

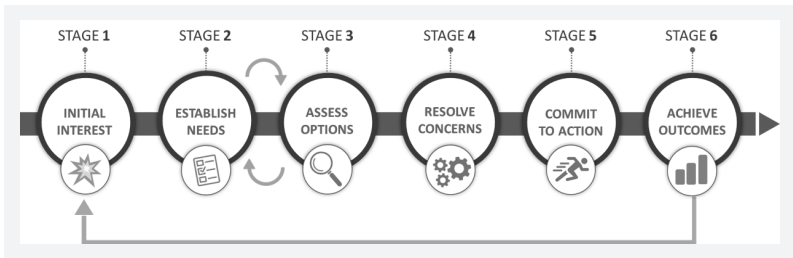
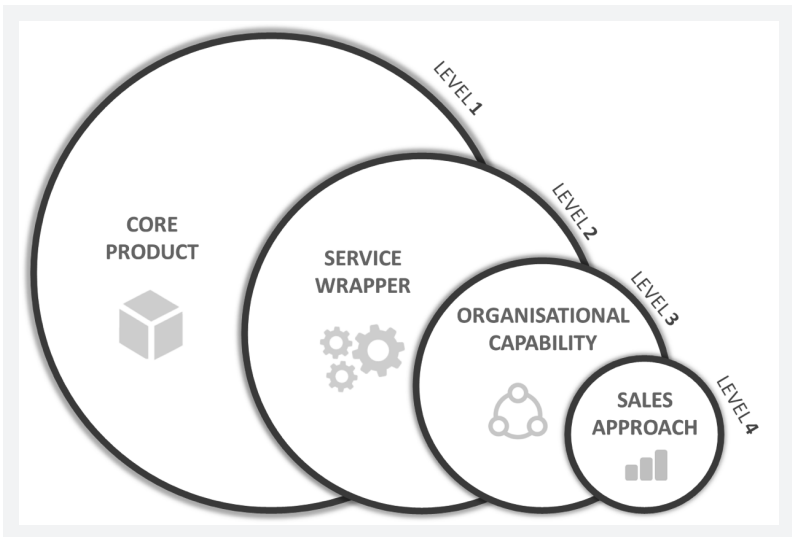


Figure 3.1: The Six Stages of the Customer Buying Journey

# CHAPTER 4 EXPLODING THE USP MYTH AND THE TRANSFORMATIONAL DIFFERENCE



*Figure 4.1: The Four-Level Model for Differentiation*

# CHAPTER 5 THE TRANSFORMATIONAL MINDSET

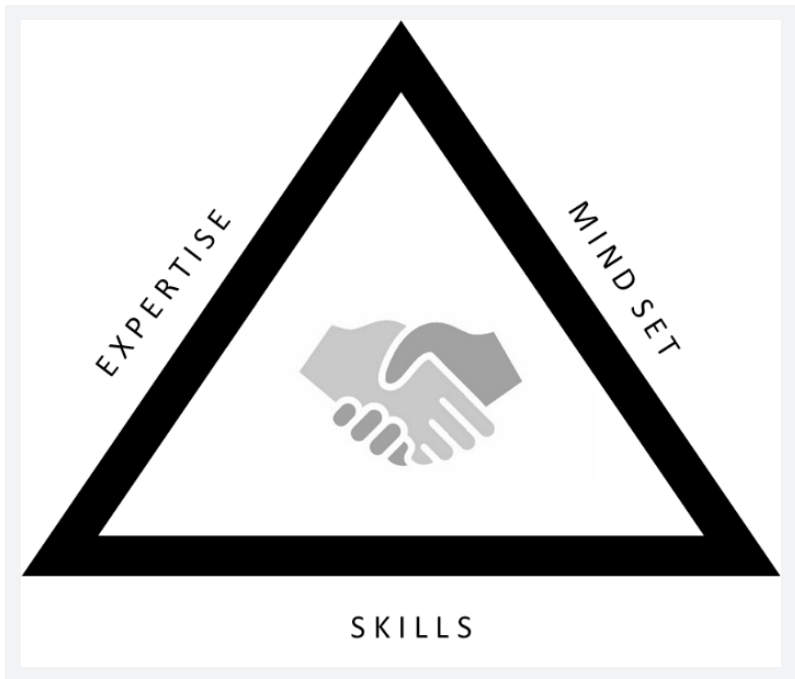


Figure 5.1: The Transformational Triumvirate

|                   | <b>Comfort Zone Selling</b>  | <b>Action Zone Selling</b>  |
|-------------------|--|---|
| <b>Networking</b> | <p>Over-reliance on selling to an existing customer base or engaging only with established contacts. Failure to network with more senior decision makers.</p>  | <p>Actively seeking more contacts and connections, engaging with more stakeholders (particularly those at a more senior level).</p>   |
| <b>Servicing</b>  | <p>Whilst 'going the extra mile' is viewed positively, many sellers offer regular free assistance and support for their customers under the misapprehension that this increases loyalty leads to more sales.</p> <p>There can be a tendency to give things away as part of the sales process – free samples, extra time, product trials and proof of concepts – without establishing clear success criteria.</p> | <p>Ensuring that there is some form of 'quid pro quo' for the work carried out. If you are going to offer the customer a free trial or sample, you need to have agreed specific criteria around what constitutes success and have established a plan following a successful proof of concept in return.</p> |



|                      | <b>Comfort Zone Selling</b>  | <b>Action Zone Selling</b>   |
|----------------------|--|--|
| <b>Relationships</b> | <p>Although having good customer rapport is highly desirable, it's not the same as having an excellent business relationship. Knowing your client's favourite sports team or their children's names as the sole approach for relationship development is not going to be an effective business strategy.</p> | <p>The most critical element is understanding the customer's business drivers, their success measures and desired business and personal outcomes – including how they are measured and rewarded.</p>                       |
| <b>Commitment</b>    | <p>Agreeing to send literature, put together a quotation, or offer to write time-consuming proposals, without any real commitment from the customer to play their part. Eager to please and happy to do something for the client without asking for anything in return. Here, the commitment is passive.</p> | <p>Testing the customer's level of desire and commitment by expecting something in return: whether that be their time, introducing other stakeholders, access to sensitive information or an agreement towards a plan.</p> |

|                           | <b>Comfort Zone Selling</b>   | <b>Action Zone Selling</b>   |
|---------------------------|---|--|
| <b>Order-taking</b>       | <p>Waiting to be asked for something by the customer and then only providing what they've requested to keep the customer on-side during the sales process. Not wanting to rock the boat or risk damaging the relationship by exploring other possibilities.</p> | <p>Broadening the conversation, up-selling, cross-selling or identifying a more holistic solution. Questioning to explore why the customer has made the request and ensuring they have understood what they are looking to achieve in the long term.</p> |
| <b>Account management</b> | <p>Acting as 'account maintenance executives', performing functions which should be delegated to customer services or technical support, failing to get higher and wider within an account and ignoring potential 'C Level' contacts.</p>                       | <p>Being focused on how to grow an account and take income and profitability to the next level. Supporting the achievement of customer outcomes, driving more strategic conversations and establishing their longer-term business objectives.</p>        |

|                             | <b>Comfort Zone Selling</b>   | <b>Action Zone Selling</b>  |
|-----------------------------|---|---|
| <b>Prospecting</b>          | <p>The advent of 'Social Selling' has changed the communication landscape and 'social networking' has become hugely significant. However, over reliance on sending emails or messaging as the mainstay of prospecting is a sign of a seller wanting to avoid the discomfort that comes with more two-way customer interactions.</p> | <p>The use of Social Selling, email and other forms of interaction are components of good prospecting, but only as part of a holistic strategy that includes making calls, virtual meetings and face-to-face communication. It's almost impossible to change viewpoints, handle difficult situations, negotiate effectively, or gain active commitments, without speaking to a customer.</p>                                |
| <b>Not rocking the boat</b> | <p>Wanting to be liked and shying away from asking tough questions, avoiding making suggestions and readily agreeing to customer demands. A hesitance to make phone calls for fear of appearing intrusive, having awkward conversations, or ending up in conflict situations.</p>   | <p>Being cognisant that comfortable fireside chats rarely deliver sound business benefits. Understanding that unless the customer sees value, they will view such contacts as a luxury their busy schedules won't allow. Instead, deriving value from more challenging interactions and gaining new and different perspectives, by suggesting different ways of working referrals into other divisions or stakeholders.</p> |

# CHAPTER 6

## OPENING UP THE OPPORTUNITY

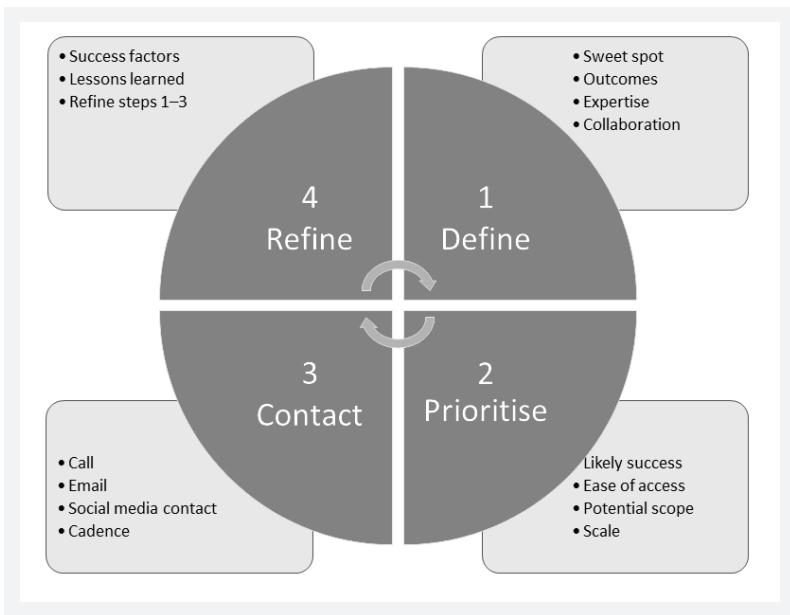
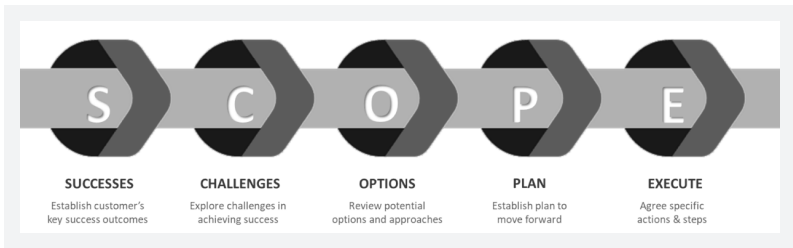


Figure 6.1: Business Opportunity Creation – A Four Stage Approach

# CHAPTER 7

## THE POWER OF COLLABORATIVE DISCOVERY (THE SCOPE MODEL)



*Figure 7.1: The SCOPE Model for Discovery*

|                   |  |
|-------------------|--|
| <b>Success</b>    | You've established their key success criteria: the outcomes they are trying to achieve and how these are aligned to the goals and strategies of the business.  |
| <b>Challenges</b> | The customer has opened up regarding potential challenges that could prevent them from achieving these goals and the potential implications.   |
| <b>(The Gap)</b>  | They have acknowledged the gap between where they are aiming to be and where they are right now (thus completing/reinforcing the first stage of their buying journey – <b>initial interest</b> ).  |
| <b>Options</b>    | The customer has identified what the critical factors are for implementing a solution which incorporates the key differentiators and selling points around your potential solution (Stage 2 of their buying Journey – <b>establishing needs</b> ). |
| <b>Plan</b>       | You have jointly walked through the backward plan and identified key milestones.   |

# CHAPTER 8

# QUALIFICATION FOR THE

# TRANSFORMATIONAL

# SELLER

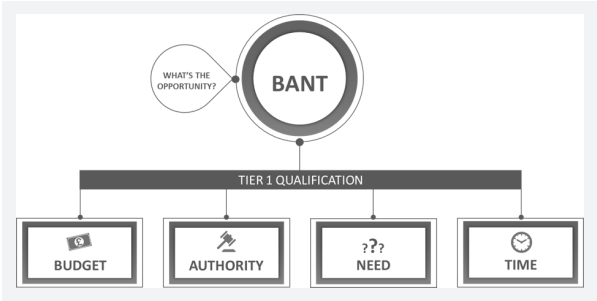


Figure 8.1: Tier 1 - BANT Qualification Methodology

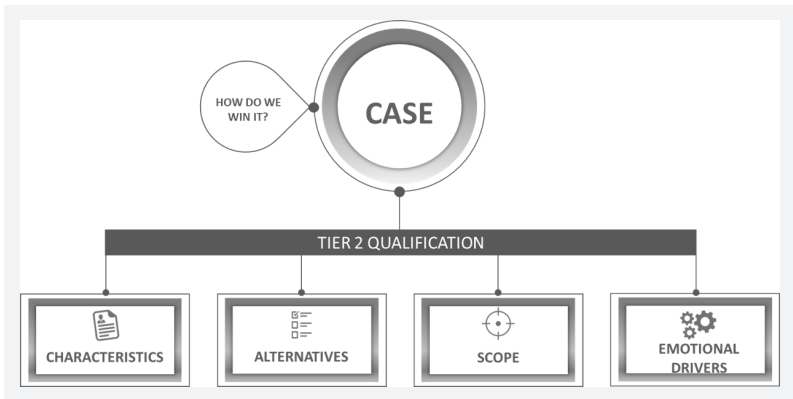


Figure 8.2: Tier 2 – CASE Qualification Methodology



# CHAPTER 9

# QUESTIONING FOR INFLUENCE

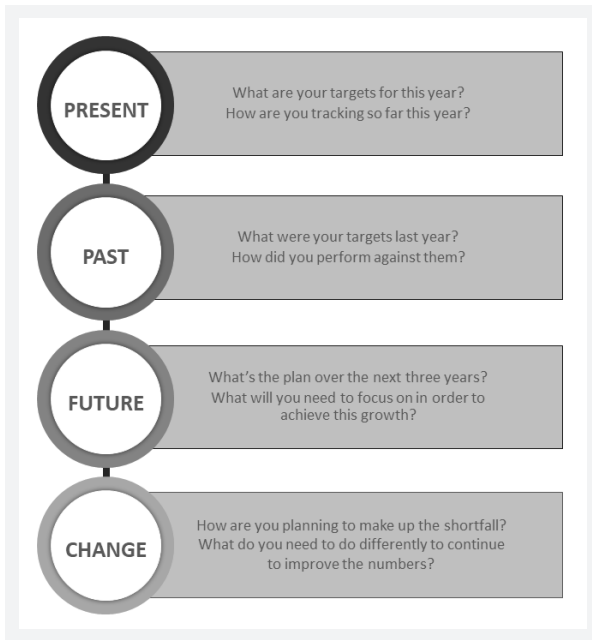


Figure 9.1: Present, Past, Future and Change Questions

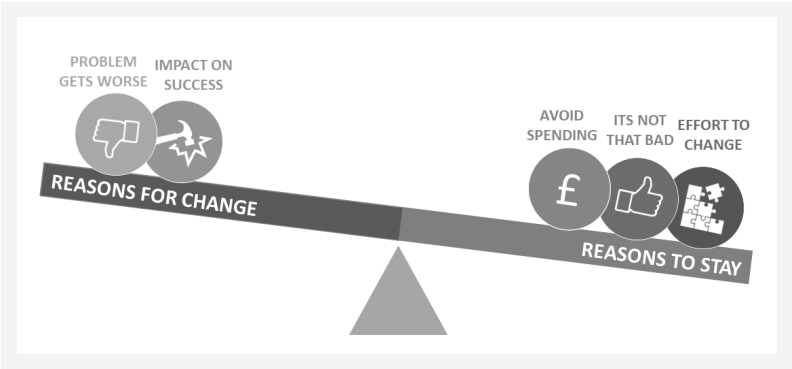


Figure 9.2: The Balance of Change

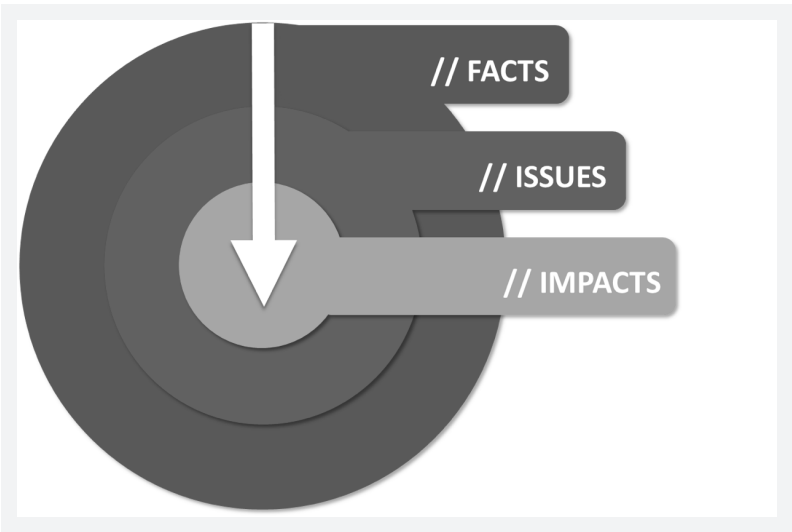


Figure 9.3: Questioning at Three Levels: From Outside to Inside

| Level of Questioning                          | Focus of Questioning  |
|---|---|
| <p><b>Level 1 – Information and Facts</b></p> | <p>Utilise: who, what, when, where, why, how.</p> <p>In terms of success criteria, current performance, current approaches, suppliers, resources.</p>   |
| <p><b>Level 2 – Issues and Challenges</b></p> | <p>Invite the customer to discuss the following with the current/proposed approach to achieving their objectives:</p> <ul style="list-style-type: none"> <li>• difficulties</li> <li>• issues</li> <li>• challenges</li> <li>• problems</li> <li>• barriers</li> <li>• risks</li> <li>• concerns</li> </ul> |
| <p><b>Level 3 – Impact on Outcomes</b></p>    | <p>Explore the following with the customer:</p> <ul style="list-style-type: none"> <li>• impact</li> <li>• effect</li> <li>• implications</li> <li>• consequences</li> <li>• ramifications</li> <li>• repercussions</li> <li>• costs (financially and in terms of business)</li> </ul>                      |

Table 9.1: Three Level Questioning from Outside to Inside

# CHAPTER 10

# LEVERAGING EXPERTISE

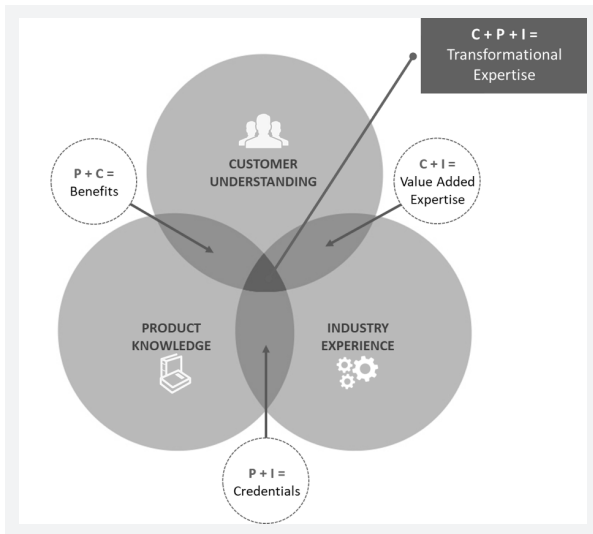


Figure 10.1: Transformational Expertise Model



Figure 10.2: The Three Steps to Leverage Experience

| <b>Using the 'did you know' approach</b> |   |
|--|---|
| <b>Customer issue</b>                    | <p>We need to improve our margins and gross profit.</p> <p>Our sales team capitulate on price and are too keen to discount to try to win the deal. Therefore, we need you to develop their negotiation skills to drive margin up.</p>   |
| <b>Our analysis</b>                      | <p>In our experience, it's probably not your negotiation skills that's the problem. Through our experience of working with hundreds of other clients, the number one root cause of issues regarding price and negotiation is in fact a lack of effective discovery and a failure to build value in differentiators.</p> |

**Using the SDE leverage expertise approach**

**Customer**

We need to improve our margins and gross profit.

Our sales team capitulate on price and are too keen to discount to try and win the deal. Therefore, we need you to develop their negotiation skills to drive the margins up.

**Our analysis**

Why do you think this is happening at the negotiation stage?

**SET UP**

Why do you think their confidence is low?

What are the sales teams doing to build value and differentiate during the early stages of the process?

**DELIVER**

In working across hundreds of clients, we've found that the number one root cause of issues regarding price and negotiation is in fact a lack of effective discovery and a failure to differentiate.

**EXPLORE**

What monitoring and observation have you done around the discovery stage of the sales process?

What observations do you have around the sales teams' ability to monetise the problem they are solving for their customer?

How could the sales team be better leveraging your differentiators?

**The SDE leverage expertise approach**

Here we want to share our knowledge and expertise around the uncertainty and risk of a security breach.

**SET UP**

What approach do you take to security and protection?

How often do you review your approach?

What experience have you had regarding attacks and breaches?

**DELIVER**

According to a recent Gartner Report, sixty-four percent of breaches go undetected. Those that are detected take on average seven months to come to light

**EXPLORE**

With that in mind, what is your biggest concern regarding security?

Where do you feel that you are most vulnerable?

What plans do you have to review your security system?

# CHAPTER 11

# MANAGING THE PROCESS



*Figure 11.1: The Belay Mountain Model – Example Sales Journey*



# CHAPTER 12

## PITCH PERFECT



Figure 12.1: Developing the Win Themes

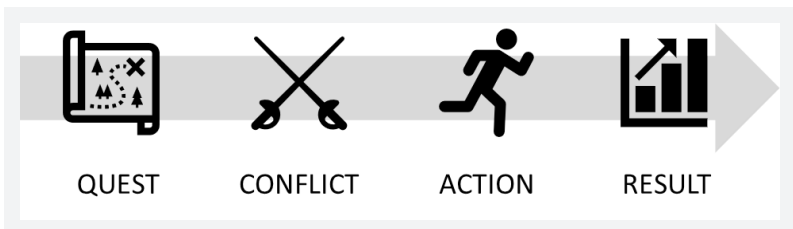


Figure 12.2: Structure of Sales Stories

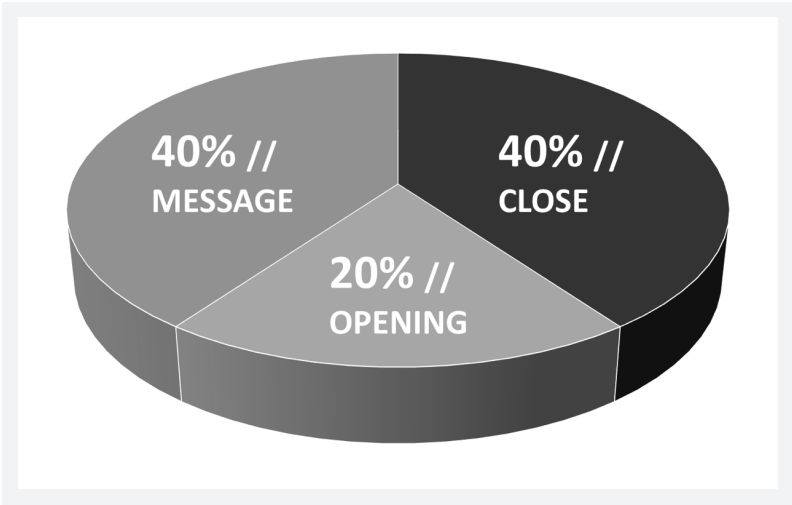
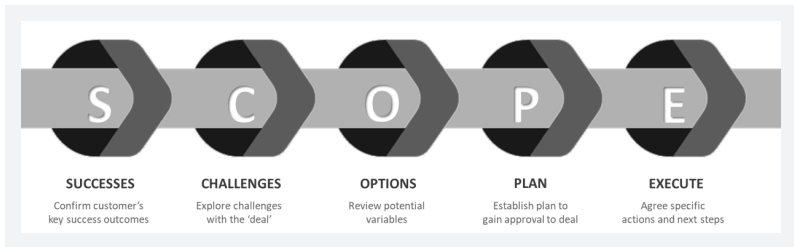


Figure 12.3: The 20:40:40 Structure for Pitching

# CHAPTER 13

## A GAME BOTH TEAMS CAN WIN



*Figure 13.1: SCOPE Model – For Collaborative Negotiation*

# CHAPTER 14

# GAINING ACTIVE COMMITMENT

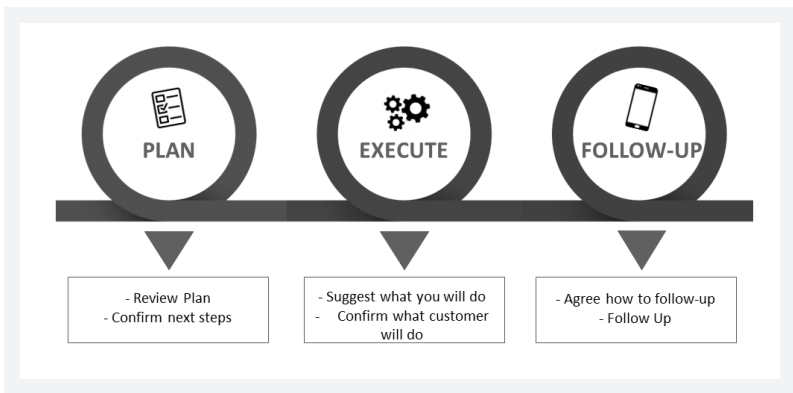
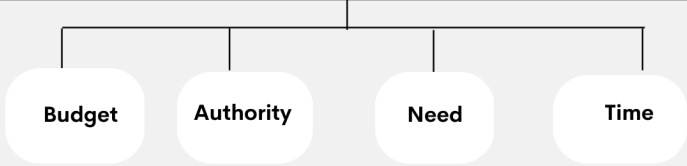


Figure 14.1: Process for Gaining Active Commitment

**APPENDIX A: TIER 1  
QUALIFICATION: BANT**

## Tier 1 Qualification: BANT



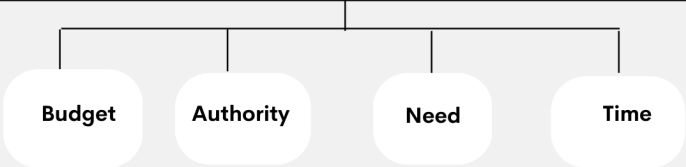
### BUDGET

- How are budgets typically allocated?
- What flexibility is there in the budget?
- Has the budget been ring-fenced for this project or is it from a central post?
- If a budget has been put forward, how did they arrive at the figure, what assumptions have they made and what research went into identifying the budget?
- Who owns the budget, who is the budget holder?
- What does the budget approval process look like within the organisation?
- What are the limits of authority across different decision makers?

### AUTHORITY

- Who are the different individuals and groups likely to be involved within the decision?
- What is the relative influence that each of these will have over the decision making process?
- What are the different 'interests' that each is likely to have in the purchase decision?
- What is the format and process by which the decision will be made?

**Tier 1 Qualification:  
BANT**



**NEED**

- What are the outcomes that the customer is looking to achieve?
- What is the strategic importance of delivering these outcomes?
- What is the **compelling event** or **erosion of satisfaction**?
- What are the potential consequences if the need is not addressed?
- How well does the customer recognise the need (and how does this differ across the DMU)?
- How well does the specification requested deliver the customer's overall outcomes?

**TIME**

- When does the customer need to achieve their outcome?
- How flexible is the customer's deadline?
- What's driving this timescale and how flexible is it?
- What are the key milestones and timeframes regarding implementation?
- What is the lag between implementation and achievement of results/outcomes?
- What are the key milestones and timeframes regarding the decision-making process?

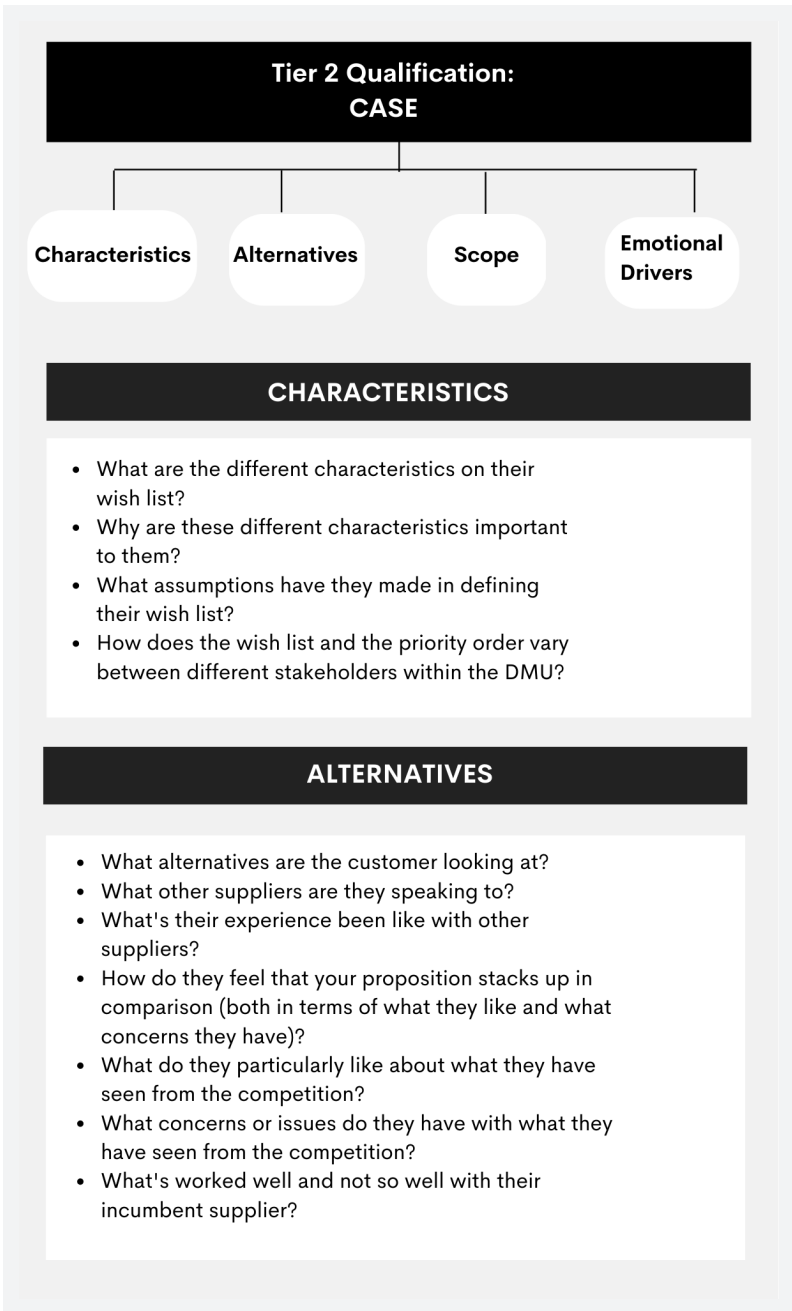


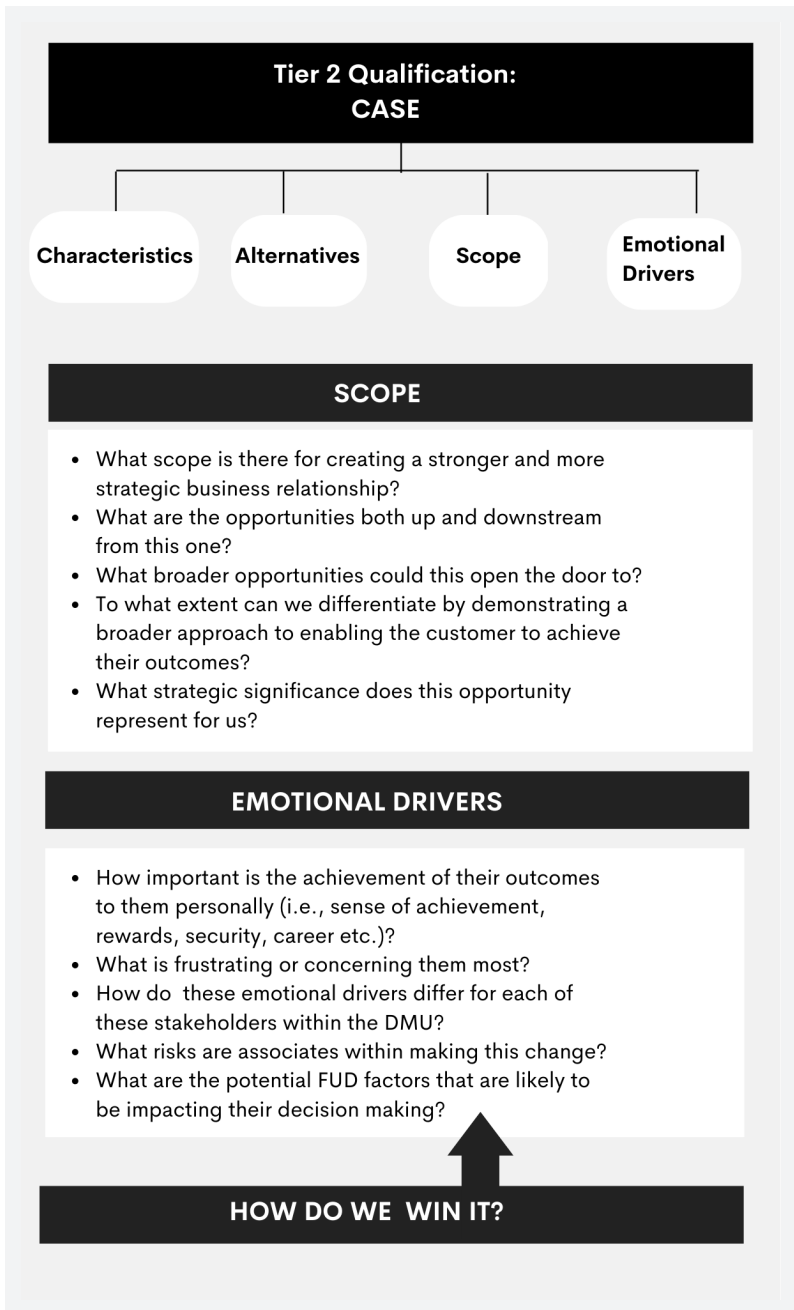
**WHAT IS THE OPPORTUNITY?**





**APPENDIX B: TIER 2  
QUALIFICATION: CASE**







# GLOSSARY OF TERMS

**Active Commitment:** where the client commits to a specific action such as agreeing to send information, attending the next meeting, getting other stakeholders involved, etc.

**Action Zone:** where a seller is adopting a proactive approach (see **Comfort Zone** for opposite approach).

**AI:** Artificial Intelligence. For example, chatbots which are starting to replace humans in Transactional Sales.

**Backward Plan:** part of the SCOPE Framework for conducting an end-to-end sales process, the Backward Plan involves working backwards from where the customer achieves their desired outcomes, to all the steps that need to happen before then to ensure success. The key is in mutually agreed next steps (see **Active Commitment**).

**Balance of Change:** the aim of the Transformational Seller is to 'tip the scales' so that the balance moves from the customer from 'Fear of Changing' to 'Fear of Not Changing' (see **Catalyst for Change**).

**BANT:** Budget, Authority, Need, Timeframe – stage one qualification to determine the value (or otherwise) of spending time on the opportunity.

**Belays:** effectively anchors at each stage of the sales process (like those a climber installs to prevent themselves from falling) to ensure they continue to progress a sale (involves Active Client Commitment).

**B2B Sales:** Business-to-business sales as opposed to business-to-consumer (B2C) sales.

**CASE:** Characteristics, Alternatives, Scope, Emotional Drivers. The second stage qualification process after BANT (Stage 1 Qualification) which defines the Win Strategy.

**Catalyst for Change:** a Transformational Seller's goal is to change a prospect's mind, either by getting them to switch from their existing supplier or through purchasing a new product or service from them.

**C-Suite/CEO/CRO/CTO/COO:** Chief Executive Officer, Chief Revenue Officer, Chief Technical Officer, Chief Operating Officer. Generally, decision-makers operating at board level or just below.

**Coach/Coachee:** In a very similar way to a manager coaching a seller, through an 'asking not telling' process the seller (or coach) gets the customer (or coachee) to open up and self-reflect, with the ultimate aim of getting them to make a change.

**Comfort Zone:** a common trait found in sellers who wait for their customer to act as opposed to pro-actively engaging with them (see **Action Zone**). Very common in account management.

**Commoditisation:** when a product or service has little or no perceived differentiation from a competitor and the only real differentiators are price and availability.

**Compelling Event:** an event which mandates a client to act such as a change in legislation, a political event (e.g., Brexit) or a technological reason e.g., Y2K (see **Erosion of Satisfaction**).

**Control Paradox:** the sometimes mistaken belief that a seller is more in control when talking, pitching or demonstrating their product, as opposed to questioning and listening where they have far more control.

**CRM:** Customer Relationship Management (generic term for an IT system to track sales progress).

**Customer Buying Journey:** the process a customer goes through when making a purchase: Initial Interest; Establish Needs; Assess Options; Resolve Concerns; Commit to Action; Achieve Outcomes.

**Differentiation:** the unique or different aspects of the seller's solution that help them to create value (as opposed to price differentiation), sometimes referred to as USPs (see **USP**).

**Discovery:** the information a seller needs to extract from a client to understand their situation, the issues that got them on their buying journey, and the pain points that you ultimately aim to solve.

**DMU:** the decision-making unit, i.e., a collection of decision makers, influencers and users who make up the stakeholder group commonly known as the DMU. 'Unit' may be a misnomer as they are not always fully aligned in what they desire from a purchase.

**Enterprise Sale:** a larger sale (sometimes described as 'big ticket') which generally takes longer to win and often involves multiple stakeholders and more complex processes.

**Emotional Drivers:** research suggests that up to 84% of decisions made are emotional, and the more emotion a client or

prospect can feel the more they are likely to act and make a decision.

**Erosion of Satisfaction:** the most common reason why a client looks to buy or change (as opposed to a Compelling Event). This usually takes longer to realise, hence the seller's job is to create more urgency.

**Event Horizon:** the way different sellers view the end point of a sale. Traditionally this has been when the order is placed (Transactional), or where the problems are solved (Consultative). For the Transformational Seller, it is when the client achieves their desired outcomes.

**Focus on Outcomes:** a Transformational Seller is concerned with the desired outcomes their customer is looking to achieve, and in doing so moves the conversation away from price and towards value.

**Foster Collaboration:** another of the three pillars of Transformational Selling, the aim being to treat the customer as an equal, involving them throughout the process and agreeing mutual commitments at each stage (see **Active Commitment**).

**Four Level Differentiation:** the four ways a business can differentiate itself from their competitors: Core Product; Service Wrapper; Organisational Capability; Sales Approach.

**FUDs:** Fears, Uncertainties and Doubts. In traditional sales thinking they would be referred to as objections, however a Transactional Seller sees FUDs as perfectly natural and welcomes them before allaying the customer's fears, uncertainties and doubts.

**Future Pacing:** the point where the client has gone beyond a point where they are likely to turn back on their buying journey and the order is within sight.



**Happy Ears:** a slang term for over-optimistic sellers who forecast deals that often have little chance of landing as they have usually not created enough Active Commitment. Sometimes done in desperation.

**HR:** Human Resources. Over the years they have become increasingly influential and may well hold budgets for training, hence could form an integral part of the DMU (see also **Learning and Development**).

**ICP:** Ideal Customer Profile. The prospects sellers should be aiming to target based on the market they are in and their likely propensity to be interested in and in a position to be able to make a purchase.

**Insights:** ways in which the seller can leverage their expertise to help them prospect solve issues or challenges based on their past experience or similar situations.,

**KPI:** Key Performance Indicators. The measures by which most roles are targeted to ensure the business achieves its overall goals and business objectives

**Labrador Effect:** a metaphorical phrase for the seller who does everything to please their client whilst asking for nothing in return, akin to the Labrador dog who always bringing back the slipper with or without necessarily getting any reward for their labour.

**L&D:** Learning and Development. In larger businesses these could be stand-alone functions, in smaller ones they may form part of an HR department or fit within another division.

**Leverage Expertise:** another of the three pillars of Transformational Selling, which involves utilising the seller's industry experience based on what has worked well with other

customers and highlighting some of the pitfalls the customer needs to be aware of before making their decision.

**Limiting Beliefs:** the often-fixed beliefs that sellers can have around prospecting, cross-selling, getting higher and wider in organisations that hold them back from being more successful.

**Monetisation:** the way a problem or issue could be monetised to see exactly what it is costing a client, or alternatively.

**New World:** the business world post-pandemic as viewed by the authors, and how this will affect the way we engage with clients and prospects in future.

**PESTLE:** Political, Economic, Social, Technical, Legal, Environmental. All issues that could be affecting businesses at any given time, and by raising relevant ones the seller has a better chance of engaging.

**Present/Past/Future/Change Questioning:** a pre-selected order of questioning to ascertain where the client is at now (in terms of desired outcomes versus actual), where they have been previously, where they would like to be in the future, and what needs to change as a result. Designed to create urgency once the customer realises they are not where they need to be and therefore require changes to be made.

**Qualification Process:** the process a seller should go through to question and understand whether or not the opportunity is realistic (Tier 1 BANT) and worth investing time in (if so, progress to Tier 2 Qualification focused on 'how do we win it?' – see **CASE**).

**Questioning from Outside to In:** by first examining the facts this technique then moves to understanding the issues and ultimately the impact of these issues if they remain unresolved. Helps to create a call to action.

**SAAS:** Software as a Service. Usually, a monthly type of contract many software businesses now apply to build up monthly and annual recurring revenue (MRR and ARR). Other derivations include IAAS (Infrastructure as a Service) and PAAS (Platform as a Service).

**SCOPE:** a new sales process. Success Outcomes, Challenges, Options, Plan, Execute. The aim is to initially widen the gap between the S and C to create urgency, then close it with the right options.

**SDE:** Set the scene, deliver (the insight), explore. A way of engaging a client through story-telling, ensuring that the case study or story is relevant and contextual the client's own situation.

**SDR:** a sales development representative, usually tasked with converting leads generated to meetings or demonstrations booked for more senior sellers, although some SDRs also sell directly.

**Seven Conditions for Selling:** the level or degree of need, complexity, risk, effort, commoditisation, decision-making and standardisation or otherwise in any sales situation.

**SLA:** Service Level Agreement. Often written into contracts so that both sides can measure how well the levels are being adhered to.

**Stakeholders:** the people in a company involved in the decision-making process (see DMU). They may comprise a mix of decision-makers, influencers, sponsors, detractors and end-users.

**Story-telling:** the art of using relevant stories or case studies to increase credibility and build trust, using the Quest – Conflict – Action – Result method.

**TCT Spectrum:** Transactional, Consultative and Transformational Selling defined. Indicates how to move from the left (Transactional) to the right (Transformational) to avoid extinction in the New World.

**Transformational Expertise:** the combination of product/service knowledge; industry experience and customer understanding used collectively to enable the seller to act as a Transformational Seller.

**Transformational Mindset:** the three key assets: expertise, skills and mindset, which need to be harnessed collectively to become a Transformational Seller.

**Transformational Selling:** based on the three core pillars: Focus on Outcomes, Leverage Expertise, Foster Collaboration. This is effectively a 'Super-Consultative' form of selling.

**USP:** Unique Selling Point, otherwise known as key differentiators.

**Urgency to Act:** accelerating the erosion of satisfaction; in the prospect's mind so that they make faster decisions in favour of the seller.

**Value:** defined as the Perceived Difference x Problem Solved.

**Value Added Supplier:** the ability of a seller to demonstrate value as opposed to selling purely on price.

**Win Themes:** used when pitching or presenting, starting with differentiators, identifying customer challenges and demonstrating successful outcomes.

**20-40-40:** the approximate percentages sellers should be working towards when delivering pitches, presentations and demonstrations. 20% summarising the situation and key chal-

lenges, 40% pitching or demonstrating, and the final 40% to gain client feedback, discuss further and agree next steps.

