CASE STUDY: ANATOMY OF A BUYING DECISION

A buyer needs to resolve a problem. Period. They don’t want our offering. They don’t want a good price. They don’t want a nice vendor. They only want to resolve their problem in a way that’s congruent with the way their status quo is set up so that the change wrought by a new solution will not create chaos.

We also know that if they can use an internal, or familiar, solution, they’d prefer it, and that before they make a purchase they must get buy-in from all elements that touch the Identified Problem.

We know the rules of systems and how they affect the culture buyers live in, how the shifts going on in the world are changing our business climate.

It’s time to add the decision facilitation tools into the mix.

THE SET UP OF THE SKILLS SECTION

Let’s enter a buyer’s environment and walk with him through each stage of his buying decision process. Let’s also follow a vendor through her sales process.

To ensure accuracy, I called several friends who know the anatomy of a sale in the web-design/technology category. We broke down every activity that a buyer must go through in a typical corporate situation including how and when the decision makers were folded in, and how and when the vendors were brought in.

We then figured out the amount of time each aspect, each meeting, each decision took. They came up with 44 weeks; it sounded too high to me so I downsized it to 36 weeks. I later spoke with a seller in the exact same situation and he told me that he was still waiting for the final agreement after 13 months: He’d been to see the prospect three times, he’d had many calls to follow up, and he was recently told they were 90% ready to go but still needed ‘some time.’

Enjoy the case study. It will open your eyes to why we face the frustrations we face every day as a vendor, and have some compassion for what our buyers are going through on their end. And, ultimately, we’ll learn a new way to sell that not only closes more sales, but also makes it possible to serve our buyers.

WHO IS THE BUYER SUPPORT PERSON?

To let you know how ingrained the sales model is, I want to share a story of what happens when I teach sales folks to think about the buy-in necessary for a purchase to happen.

In my company, we run a two-day Facilitating Buying Decisions program to teach sellers how to understand every aspect of a buying decision. In one of the exercises, there are three roles: Seller, Buyer, and a Buyer Support person. No one sees each other’s instruction card, of course. The Buyer Support card which represents the unseen systems elements that ‘control’ the buyer’s buying decision, specifically explains the reasons why this person won’t allow the Buyer to work with a different vendor, spend money, etc. In other words, this person is the ‘Nay Sayer.’

During this exercise, each person gets to play all three roles, so they understand the buying decision from each aspect: Of course they are familiar with being a seller, having had years of experience with buyers, but they (similar to many sales folks) are not familiar with the important function that the people in the buyer’s environment play in the buying decision. Hence the reason for the exercise.
During the exercise, time after time, I watch while the person playing the Seller ignores the person playing the Buyer Support role, even after they have played that role, read their role card, and understand that the sale can’t happen without a new decision from this person.

The person playing the Seller absolutely cannot seem to get off pitch, or relationship building. This seller cannot even address—for a moment!—the person sitting right next to the Buyer! Even though the person is the real decision maker! And they don’t understand why someone who is not “The Buyer” has any influence and should be included in the discussion. In the post-exercise Q&A they look at me in confusion. “Why did you throw that Buyer Support card in there? What were we supposed to do with that?”

One time, the Seller role was played by a line salesperson, and her manager played the Buyer Support role. In that role play, the Buyer Support person scenario was a majority shareholder with an active role in signing off on expenditures; the buyer was a visionary who loved finding new things to buy and try. At the time of the role play situation, the Buyer had been on a spending spree; the Buyer Support role was to stop the Buyer from spending any more money.

During the role play, the Seller totally ignored the Buyer Support person, preferring instead to develop a delightful relationship with the Buyer. And boy, was the Buyer pumped. They loved each other, made promises, talked implementation, and so on.

After the role play, the flushed Seller turned to her boss—whom she had ignored for 30 minutes—and said, “Closed it.”

“No you didn’t.”

“Of course I did,” she said.

“No you didn’t. I’m not allowing him to spend any money.”

“You’re wrong,” she said. “I nailed it.”

The manager showed her his card, pointing out that the top decision maker would never allow any expenditure. She read the card, thought about it for a moment, and then said, “I don’t care what this card says. I nailed it, and it’s a closed sale.”

So much for reality.

THE SCENARIO

Here is the set up for the sales situation. I made it as real as possible, and this set of events and timing were approved by three different sales folks. Enjoy.

THE BUYER’S STORY

Scenario

Background: Joe Sternblatt is a marketing manager of a 150-person manufacturing company. He joined the company about eight months ago and is quite happy there. He’s effected change, had some success, and believes it’s now time to begin to fully integrate the internet, social marketing, and a good, solid web design into the company brand.
His initial obvious problem is that he hasn’t had much of a relationship with the sales department. While they have made a few tentative stabs at connecting—one rather cordial lunch initiated by Joe—they share no vision or strategic initiatives.

The company really doesn’t foster collaboration—everyone seems to work as if an island. The branding and customer service managers have issues, with customer service sometimes at odds with the branding manager’s initiatives, and certainly always in some sort of tiff with sales. The branding team works by itself, believing that they are better than the rest. And the company has had no initiative or agenda around getting the groups to work together.

Until now the internal tech team has designed and managed the company website. It hasn’t been particularly creative and doesn’t use a lot of the more modern technology, like social networking, or customer surveys. But it has done the job of offering company data. Their web views have been mid-range—‘acceptable.’

**Identified Problem:** Joe wants a more professional and interactive web site. He is not happy with recent studies that show that their site isn’t getting the traffic they should be getting. Nor are they using their web presence in the most proactive manner: the site should be so much more than a brochure. But the tech guys have so much other work to do and they aren’t savvy designers.

Joe thinks it’s time for a professional web design group to come in and take over from the in-house tech team. He doesn’t believe that the internal group has the skills to design an up-to-date site that will both create a client community and get the marketing department (Joe’s group) the data they need. Plus, he wants to use some Sales 2.0 methods to drive traffic to the site, have a group of rotating bloggers, have some marketing offers of free stuff, and possibly have the sales team do some calls to folks who send in the Contact forms.

Joe is willing to take on the challenge of finding a good design group, as well as doing the work of getting the obvious departments to work together. He understands he has an uphill battle getting people to agree.

Joe knows he runs the risk of not being seen as a team player. Until now he’s gone along with the rest. And he knows they have political capital he doesn’t have. But he believes that it’s so important now, with this economy, with this much change going on, to have a website that does what it is meant to do: Prove that their company is professional and authentic, cares about customers, and is ready to listen to customers as part of their brand. The competition advertises similar products on their site and offers great promotions, pod-casts and community building. It’s killing Joe’s business.

Joe believes they need to do something immediately. To get this to happen, he’s got to bring sales, marketing, branding, and customer service together to work more closely.

He’ll start developing the relationships. He should have done it months ago anyway. His goal, of course, is to get them to agree to a new web design from an outside group, and get them to help pay for it.

There is currently no budget for a site redesign because all tech work has been done in-house. Given that the tech manager reports directly to the CFO, it’s a good bet that the CFO would want her tech folks to do any site work and won’t provide budget for someone to do the work her team should be doing.

Joe is hoping that the expense of a new design vendor could be shared with the partner teams, taken out of line items or travel. But first they’ll need to agree to do the site redesign.

Joe is ultimately going to have to figure out a way to get buy-in from the CFO. She hasn’t shown any
particular penchant for creativity or for using the web for promotions or customer outreach.

No one in the company is even doing a blog. Joe will have to get her up to speed and show her some numbers—how much business they are losing to the competition—so she’ll understand the importance of beefing up the website.

**Hidden systems elements:**

1. *Work-around:* Current tech team has been doing site designs and maintenance ever since they put up a website, as part of their normal responsibilities. There is no dedicated group, but all tech team members enjoy doing parts of the web work as well as the other programming needed by the departments. A new tech manager started six months ago and all managers like him a lot.

2. *Management collaboration:* Current teams have very little interaction, although it would seem obvious that sales, marketing, branding, and customer service should be working closely together. But the culture has no political capital around collaboration. In fact, the managers are quite competitive for funds, and hostile with each other, never sharing ideas or projects. As a result, sometimes there is overlap on initiatives and funding.

3. *Budget:* There is no budget for this site redesign. Money would have to come from partner teams (who have never shared budget before), or the CFO (who has no criteria around changing the site design).

4. *External vendors:* No external vendors have been used for tech stuff; all technical work has been done in house.

   Joe has plotted out a route through the problem that involves getting into partnership with his colleagues, then getting buy-in for a site redesign so he can get their help, input, and funds, and then getting the group to influence the CFO to give them money or approval.

   They will use prospective vendors to give them the details of what they might do, and have the tech team compete for the business. And then choose one of the vendors. Hopefully, they will get the approval to move forward and do the design and the implementation without the internal tech team being involved in any way. Fingers crossed.

**THE SALES CYCLE**

_*Chain of Events*_

**1. Meet/Create the Buying Decision Team.** Joe starts having informal lunch meetings with each of the other collegial managers: the sales manager, brand manager, and customer services manager. He focuses on starting collaborative relationships.

   It’s not going well with the sales manager, but there is some opening with the others. Joe starts conversations about their thoughts on the current web design. He discusses the site traffic, shows the report that has the company lagging in the competition, and starts a discussion around possibilities for a more professional web site. He tries to get agreement.

   Joe discusses doing some research on different sorts of sites, different outcomes of social networking, podcasting, and customer outreach via Sales 2.0 He also brings up the differences between hiring an external web team vs. using their current team and the problems inherent in each.
During several informal lunches, he discusses technology choices, possible vendors, SEO, and so on. Although they don’t start planning, at least the discussions have begun. He gets mixed responses about keeping the project in-house versus bringing in a professional web design team. And, the sales manager continues to be somewhat hostile to any ideas other than her own. Other colleagues finally agree to research web design options.

(Time elapsed: 3 weeks)

2. Hold Group Meeting with Colleagues. The managers meet. Joe chooses not to discuss some of his research, or get the tech folks and CFO involved until the group joins forces and decides what they want to do. Hopefully he can convince them to see it his way.

He gets them to discuss who would have interest in a new web-site. Do they want the tech work to remain in-house or can they consider an outside vendor? Managers are not so happy with tech team, but they want to give the new tech manager the chance to shape up. They don’t hold out much hope given what they’ve seen to date, but think he deserves a chance.

They each agree to think about choices and come up with some thoughts and ideas about needs and possibilities. They agree to have Joe have an information-gathering meeting with the tech manager. Joe decides to not mention the fact that they have never worked together as a ‘team’ and figures that as this progresses, they will realize how much they need each other.

(Time elapsed: 2 weeks)

3. Meet with Tech Manager. Joe meets with the tech manager to discuss discontent about the current site design and the competitive report showing how much business they are losing. Joe wants to hear his thoughts on the current site, and learn about future plans.

He asks him to begin thinking about site redesign and shares that he’ll be doing research as well about upgrading their site design and capability. Joe tells the tech manager that the other managers have interest in a possible redesign also.

(Time elapsed: 1 week)

4. Meet Vendors. Joe invites four vendors to present their capability so Joe understands what’s possible—how the new bells and whistles of web sites could benefit them. What could it look like for their company? How would it look in relation to the competition? How could it drive business? How could they compete? How would Sales

2.0 be instituted? What would it demand from each of the groups?

(Time elapsed: 2 weeks)

5. Meet with Colleagues. Joe meets with sales, customer service, and brand managers. He listens to the ideas they researched, and shares data gleaned from vendors. Topic for discussion: Can our in-house team give us anything close to what a new vendor could offer? How will we know? Brainstorm.

Team agrees to have Joe meet with CFO to discuss possibilities and need for more professional website. The group discusses next steps and how to handle tech team. They agree to sit down with the tech team once Joe brings back the issues raised by the CFO if it becomes clear that she is not inclined to want to do anything new.
Joe asks to be Project Manager of the site redesign.

The sales manager is having a hard time staying with the project. She’s got her own external PR group that creates a campaign with each new product launch, and she’s been meeting her numbers every year. Joe must have one more lunch with her to find a way to get aligned.

*(Time elapsed: 3 weeks)*

6. **Meet with CFO.** Joe presents data from competitive web sites to the CFO. He outlines the current needs of the brand, sales, marketing, and customer service managers. He discusses how a new site design could enhance the company’s market position, bring in new business, and give customers a vehicle to communicate. Joe shows her some competitor’s web sites. He explains the offerings from the vendors, and the discussions with the tech group.

The CFO doesn’t have any particular interest in doing a web-redesign. But if Joe and the rest of the teams push, she’d want it to remain in-house unless they prove to her there would be a difference in results. She states that there is no budget and thinks the idea is a waste of time and money given that the company is meeting their numbers and doing well financially. She tells them that they would have to find the funds from their own budgets if they are adamant about going outside for a vendor.

*(Time elapsed: 2 weeks)*

7. **Meet Again with Tech Team.** Joe brings ideas gleaned from the vendor presentations to the tech group and discusses some ideas he has put together for a new site.

He asks how long it would take to come up with a redesign, and do the research, design, test, and implementation. He asks the tech manager to start thinking about all of the possibilities. They set up a time to sit down and gather specs. He also gets agreement to meet with the vendor groups to see if their presentations will give the tech guy any ideas on what he needs to do.

*(Time elapsed: 1 week)*

8. **Tech Team Meets with Managers and Vendors.** Vendors come in again to present to the Buying Decision Team. All managers and tech manager are included. They discuss costs and timing and the possibility of the vendor doing the site design while collaborating with the tech group for programming. They all discuss possibilities of vendors doing the entire project, with no help from the internal team. They discuss the tech team doing the entire project with no outside help. They discuss time frames. The managers ask questions, vet ideas, offer suggestions.

Following the meeting, Joe asks the tech manager to put together a new presentation, and offer thoughts on collaborating with a vendor versus doing it all in house. The tech manager is not happy.

The tech manager tells everyone he’ll contact them to gather the data he needs to put together a presentation for them. His plan is to create something better than the vendors presented.

*(Time elapsed: 2 weeks)*
9. **Meet with Managers.** The managers get together to collaborate and brainstorm to decide if they want to use their in-house group or an external group. They must also discuss time frames and budgets, and figure out where to get funds if the CFO won’t release money. Would they have available funds in their budgets? They must put together a report to give to the CFO once they decide what they want and who they want to use. They all agree to meet with the CFO.

   Joe can tell there is a problem brewing. The managers are jockeying for position, the sales teams are saying they don’t need to participate since they have their own vendor, the customer service group saying that sales should pay for the whole thing, and everyone is holding their cards close to the chest.

   *(Time elapsed: 2 weeks)*

10. **Meet with Managers and the Tech Team.** Joe and the other managers meet with the tech team to see their ideas for the site design. All of the managers bring and discuss their individual specs.

   They discuss the possibility of the tech group working alongside a vendor in case the team decides to have the vendor do the site design. Would they be willing to collaborate with a vendor?

   The tech group wants to do all the work. But if they cannot match the vision and capability of the vendors, or do it in a reasonable time frame, it’s not worth it.

   *(Time elapsed: 2 weeks)*

11. **Management Team Meeting.** The managers meet to decide how to move forward: Should a vendor do the whole job, or just do the design while the internal team does the implementation? How does this get funded if we use a vendor? Who pays what percentages? Who is responsible for what? Who will be responsible for the implementation? Would the tech team get involved if the external vendor does it and the tech guys are hostile? Who gets what space and what capacity? What needs to be accomplished? Problem: Sales is still not on board, but will be a silent partner.

   They all get ready to make a presentation to CFO. They divide the responsibilities among the team members.

   Joe sets up another lunch meeting with the sales manager to try to convince her to join forces (and budgets).

   *(Time elapsed: 1 week)*

12. **Design a Presentation for CFO Presentation.** Managers meet several times to develop the presentation for the CFO.

   *(Time elapsed: 3 weeks)*

13. **Make Presentation to CFO.** The managers make a presentation to the CFO that includes:

   a) Vendor data, site design choices. Prices. Capabilities at completion.

   b) Choices between having a vendor do the entire project or a vendor doing the site design while the in-house tech team does the implementation and programming. Includes: time elements, financial elements, personnel elements, implementation elements.
c) Tech design is presented, along with time frames and costs. Includes projects they will have to put on hold to do this, or alternatively put this site redesign on hold for six months.

d) Managers present a case for financial viability for doing a site redesign with a vendor if the tech team can’t complete it in a reasonable time frame.

The CFO will not release any budget and prefers using the internal tech team. She can’t understand why vendors would do a better job than the internal team. She also has no feelings of urgency, believing that everyone is going through hard times, and that there are more important things to do with the funds.

When the entire group pushes back, she relents and agrees to have a vendor do the design so long as the managers find their own money. But her main criterion is to have the tech folks be involved as much as possible—certainly to do the programming, regardless of how long it takes.

(Time elapsed: 5 weeks)

14. Final Choices—Meeting with Management Team. Meet with all managers to make some decisions: Are they willing to take funds from their budget? Do they want to see vendors one more time? They decide they’d like to have a vendor group do the site design immediately, and have the tech group do the programming.

They discuss criteria for choosing a vendor. Originally they had wanted the group most technically exciting. Now they have to choose a vendor that knows how to work well with their tech team, knows how to be patient, and knows how to lead without taking over. The CFO will hear about it if there are any slip-ups. They are not sure that they have had the right vendors come in to present, now that the choice criteria have been changed, but they agree to choose the most appropriate from the ones already seen to avoid wasting more time.

A follow-on discussion occurs about which of the four vendors would be most appropriate. Two are chosen using the new criteria.

(Time elapsed: 2 weeks)

15. Data-Gathering Sessions with Vendors; Vendor Presentations. The two favorite vendors come in with final presentations and fees to do just the website design. Following the presentations, the team chooses the vendor that shows the greatest capability of working collaboratively. They were more expensive, but the other vendor never discussed their ability to collaborate—a crucial element in their Identified Problem given the vendor will have to work closely with the tech team.

(Time elapsed: 2 weeks)

16. Financial Discussion. All the team managers must figure out how to contribute funds from their budgets. The sales manager also agrees to contribute, but it was touch-and-go for a few days.

The teams must negotiate how much they should be contributing. There are several internal issues that fall out from group managers concerning who should contribute more/less, who should have more sway with site design, and how their individual groups would be represented on the home page. Indeed, as a result of these negotiations, the sales manager fell out with the other teams, although she reluctantly agreed to give her share of the cost.

Contract developed for vendor.
(Time elapsed: 2 weeks)

17. Meeting with Chosen Vendor and Tech Manager. Figure out how to begin working together.

(Time elapsed: 1 week)

Total elapsed time: 36 weeks, mostly spent aligning calendars for meetings, and getting buy-in.

HOW THE BUYING DECISION AND THE PROJECT PROGRESSED

As Joe continued through the process, the historic issues between the partner teams became more and more problematic—managers who never worked together were cautious, everyone was competitive, and no one wanted to free up money from their budgets. Indeed, except for the tech manager who, surprisingly, really partnered with him, Joe ended up stirring up issues that had troubled him from the time he joined the company, especially the professional clashes with the sales manager who had an historic issue with the marketing department.

Joe spent most of his time having private conversations with each of the managers, getting them to buy in to his vision, only to have the progress delayed once the entire group was together and people were jockeying for position.

Eventually the tech manager told everyone that he realized that one of the vendors was doing some really interesting things with SEO, and Google Adsense, and use of social network marketing. He thought the company would be served best if they chose that vendor.

Ultimately everyone bought into doing a site redesign using a vendor, and having the tech team doing the implementation, programming, and testing. Eventually, they figured out how to divvy up the costs, and meet regularly to jointly decide on site designs and functionality.

SUMMARY OF THE BUYING ENVIRONMENT

As we read this case study with our understanding of systems, decision making, and how an Identified Problem sits within a system, the problems are painfully obvious.

Most of the ultimate needs were unknown when Joe began his search for a solution. Certainly he did not have his full range of criteria for his solution choice. Here is a list of what Joe couldn’t know when he started:

1. If the other managers would be willing to collaborate and form a support team;
2. If the other managers would buy in to a tech project and be willing to work together to come up with joint site designs;
3. If the other managers would be willing to seek an outside vendor;
4. If the CFO would have any flexibility or be supportive;
5. If the tech group could come up with a viable site redesign and have time availability to do the work;
6. If the tech group would be willing to work with a vendor to just program the back end of the project;
7. How to choose the vendor and how to get the partner groups to agree on specific criteria for making a choice;

8. If any of the vendors would exhibit collaboration skills. If not, they’d have to go back to the drawing board;

9. How to manage budgetary issues given the history of the partner groups working individually, without partnering;

10. Any technical issues that would be problematic;

11. How the managers—brand, tech, marketing, sales—would work with the new vendor and if there would be any human fallout;

12. How the handover would work between the old and the new groups;

13. How the new and old technology would work together and how to manage any technology issues;

14. If there would be any customer problems with the new site technology;

15. How the customer service people should be involved in case of any problems;

16. How/if to get agreement—and money—from the CFO.

Until or unless these issues were resolved, there would be no sale. Each of the people involved had a series of decisions to make that didn’t necessarily involve Joe or the web design problems but factored greatly in the decision to choose a vendor.

The systems issues were pervasive. Obviously any vendor entering into this situation would be a pawn in the corporate drama.

Before we walk over to the seller’s side of the table, let’s take a look at what would happen if Buying Facilitation® were used from Week 6 when Joe first called the vendors. See how the decision facilitation process helps Joe’s decision making process from the first call.

**HOW BUYING FACILITATION® CHANGES RESULTS**

This conversation will facilitate the hidden, behind-the-scenes issues that Joe needs to manage before he can move forward with a site redesign. Buying Facilitation® will actually teach Joe how to recognize and manage the sometimes unconscious issues in his system so he can get necessary buy-in and proceed to a purchase.

As you read through the dialogue, notice how the vendor (Victoria) leads Joe through stuff he couldn’t necessarily know would come up. Notice how there is no real pitch or product discussion.

As Victoria helps Joe maneuver down the decision phases, notice how natural it is. Notice how she leads Joe sequentially through each of the decision phases and through each step of the buying decision cycle. In Chapter 15, I’ll break apart each element in the dialogue. For now, just note that it seems so effortless and simple.

Indeed, Victoria takes on the role of a neutral navigator while Joe takes her along his route with him. Joe would be able to get where he’s going to end up eventually, as you saw, in 36 weeks.
As you’ll see, Joe can do it so much more efficiently with Victoria leading him down his own route, a route that was unknown to him at the start of his discovery process. Ultimately, Joe not only gets where he needs to be faster and easier, but there is better implementation, buy-in and less disruption. And Victoria gets more business.

*Note of caution:* As you read, notice that Buying Facilitation® effortlessly leads the buyer through all of the systems issues he must manage and resolve before he can make a purchase.

In the dialogue, the contact-to-purchase time was reduced to 12 weeks; the vendor ended up with a larger, quicker sale, and the buyer ended up resolving his problem much earlier, with less political fallout, and with a better solution. Win-win.

What we’re doing here is not typical in the sales process. Notice how Victoria avoids falling into the sales traps during those times it would be natural to gather information, pitch, sell, or have answers, and instead helps the buyer manage his decision process.

Note that because the sales model is so ingrained in our thinking that the case study might seem impossible. But when my clients learn Buying Facilitation®, they’ve had these conversations, with these sorts of results, for over 20 years.

**THE BUYING FACILITATION® DIALOGUE**

This dialogue will take place on the first call that Joe makes to Victoria. Note how Victoria gets to Joe’s buy-in issues immediately: these first Facilitative Questions help them both ascertain if Joe is a real prospect. Along the way, Victoria teaches Joe the sorts of issues he must manage well before he had even realized he’d need to do those things, thereby speeding up the buying decision process.

As a result of the type of leadership Victoria provides, she gets on Joe’s decision team quickly. Note the entire discussion is leading Joe through the type of change he must manage: This is not a product sale—and yet a product sale can easily occur once all of this is managed. Victoria is actually teaching Joe what he has to do to achieve his goals with his colleagues, and open up the possibility of her being a solution provider.

*Joe calls a local Google listing for a Web Designer.*

JOE: I’d like to speak with someone who can provide me with information about doing a web design for a $15 million company.

VICTORIA: I can help. My name is Victoria. Who am I speaking with please?

JOE: I’m Joe. Are you one of the designers?

VICTORIA: I am. Do you have some time to speak now or should we make an appointment to do this at a more convenient time. We’ll need at least 30 minutes because I’m going to have a lot of questions.

JOE: We can do this now. Do you want information about the company? About our current site?

VICTORIA: Not yet, but I will a bit later. Can you tell me something about how you currently get your site designed and administered?

JOE: Sure. We have a tech team. They’ve been handling it for about four years now. But I think it’s time for
us to get more professional so I’m seeking a vendor who specializes in site design. I saw your stuff on the net and was impressed.

VICTORIA: Thanks! So glad you liked it. We are happy with our results also. I’m wondering what’s causing you to consider an outside vendor when your tech folks wouldn’t be thrilled giving up a job they’ve been doing for years. It must be a part of their work load.

JOE: I’m not sure about any of it. I haven’t spoken with them yet. I thought I’d speak with a few of my business partners and get the lay of the land before speaking with the techies. I don’t think they can handle it or I wouldn’t be calling you.

VICTORIA: Do me a favor? Can we put that question on a parking lot?

_How will you know that it would be viable to use an outside vendor when the current tech team has historically done all of the site design?

That question will come up when you sit down with the tech team. Not only would they have to give up some of their work, they’d have to support an external group and work together with them. Not necessarily a happy situation. Not to mention that people in your company have gotten used to them, and they are probably doing projects with a lot of the internal teams. It’s a very sensitive subject. So let’s get that down on paper and we can come back to it once I ask a few more questions.

JOE: I’m relatively new—only been here for eight months, so I inherited them. And I really think they are so inexperienced at the more sophisticated aspects of web design that it’s actually harming our business.

VICTORIA: And since you haven’t spoken with them yet, you’re assuming they won’t be able to prove to your satisfaction that they can do better, or you wouldn’t be calling me.

JOE: I am assuming that, but of course I’m going to have to give them a chance to prove themselves. They haven’t excited me yet, but I do have to give them that chance.

VICTORIA: And it appears that the others on your decision team haven’t minded their output or you all would have started looking for a new vendor before today.

JOE: Right. Most of the partner groups don’t talk to each other—you know the normal marketing/sales rift, and the brand manager thinks he’s above us all. I don’t think anyone wanted to tackle the problem, because it’s been good enough until now.

VICTORIA: And what made you stop believing it was no longer ‘good enough’?

JOE: I’ve been closely following our daily, weekly, and monthly hits, as well as those of our competitors, and noticing that we are beginning to trail. Not to mention that we aren’t doing SEO and adwords and social networking. We’ve got a lot to do to have us catch up, and I think it’s time now.

VICTORIA: So you want a site redesign, you haven’t spoken to your tech team, and your Buying Decision Team hasn’t started working together yet to determine what they might want to do, or even if they want to do anything different. And none of you know how to work together. Given all that, I wonder how the team will know how to collaborate around bringing in a new vendor when you all haven’t been able to work together on anything else?
JOE: I’ll have to do a presentation and get their attention, and I’ll have to get their agreement to start moving forward. I think if I just stress that we need to form a collaborative group to get the best site design for us all, they’ll buy in. But they aren’t the biggest hurdle. We’ll have to get agreement from the CFO because there is no budget, and because technology reports to her.

Now that I think of it, I guess I’ll need the buy-in from the other managers in case we have to get funding out of our individual budgets. I have been trying to get us all on the same page. It’s been a challenge.

VICTORIA: I hear that there are a lot of people and departments who have a preference for keeping the tech team doing the work. I also hear you have no history of collaborating with the very groups that would need to buy in to bringing in a vendor. Given the issues you’ve had with the other departments, what do you plan on doing differently to get their buy-in to either get agreement from the CFO to use an external vendor, or get her to give you budget, or find a way to get the budget from your colleagues?

JOE: Haven’t gotten that far yet. What do you suggest?

VICTORIA: It’s a good thing to realize that until all of the team members buy in to getting a new site design, or using an external vendor, or choosing to use the in-house tech team, the decision will be delayed. Especially if you end up needing the CFO’s agreement and you’ll need to join forces and provide a unified front to her. So a prior relationship and joint vision is very important.

Let’s put a few of these questions on the parking lot.

1. **What will the disparate groups need to know or understand to decide to work together?**

2. **How will the group know that a site redesign will provide the outcomes that you assume it will?**

3. **What will each group need to gain to know it would be worth their time and effort?**

JOE: That’s a good start for me.

VICTORIA: We’ll also need to figure out a business case so you can find funding in case your CFO won’t give you funds and you decide to use an external vendor for all or part of the new site.

I have another question:

**What will your CFO need to reconsider or know in order to allow in a new vendor when one of her reports is the tech manager?**

JOE: I don’t know the answer to that. I just put it on my parking lot. We need the answer to that, don’t we? She really protects him, and I don’t see her letting it go—maybe the front end design, but certainly not the implementation and programming. And that’s the part that they won’t have time to do—I know how backed up they are.

VICTORIA: I suspect she’ll try to get the tech team to do it as long as she doesn’t have any price or time criteria that would make her think otherwise. She’d need to believe there was a business case for bringing in an outside vendor, or at least believe there was a possibility that the tech guys couldn’t do a good enough job to keep up with or surpass the competition. But it seems by her actions with the current site, she hasn’t cared about that until now.
JOE: Is there any way that you could create a project in which you would do the web design and they could do the programming? That might make it easier to make that case with her. At least we could have that as a fall back position, although it is not my preference.

VICTORIA: Sure. We could do the web design and your internal folks could do the programming and the testing and the implementation. And we could oversee it as a project.

How would your Buying Decision Team know that we could give you a great design, manage the internal politics given there will probably be competing needs, and work alongside of your tech team in a collaborative way?

JOE: I’m assuming you’ve done all that before? And you have references?

VICTORIA: We do. And we’ve been doing a lot of that shared work in this economy. It sounds like a necessary consideration given the background. Sounds like there are a lot of elements inside that wouldn’t want a new vendor coming in.

JOE: I need to sit down with the whole group, and sit down with the CFO and ask her some of the questions that we have on our Parking Lot and show her your site. Then I’d need you to come in and talk with us.

VICTORIA: I’d like to know that the entire team—except the tech team, who I think we should have a separate meeting with after everyone else is on board and open to the possibility of bringing in an outsider—would be there, so we can see where we are at.

What would you need from me to help you have the best possibility of getting agreement from your teammates and your CFO to move forward?

JOE: I’d probably want your thoughts about whether or not to have private conversations first with each of them, or to start with the CFO, or to have you in to do a pitch first to get them excited.

VICTORIA: Having me in first wouldn’t make sense. If they didn’t want to move on it, I would be a reason to object. Let’s put together a plan of action. How would you like to do that?

JOE: How ‘bout if I come over there, and we put together a plan. I’d be happy to pay you for coaching me through this—I don’t want to abuse your time—and then we can figure out the steps we need to take.

CHANGING RESULTS BY FACILITATING DECISIONS

Let me generally run through the skeleton of this dialogue: We will go through it later on in the paper, so you can better understand exactly what Victoria did and why.

Victoria quickly highlighted the issues Joe would have to handle as he started on his journey to getting a better website. She collapsed the time element from the first conversation by helping Joe understand exactly what needed to happen at a systems and change management level.

Did you notice that soon, Joe began saying ‘We?’

Did you notice that Victoria uses Facilitative Questions to teach Joe how to bring together all decision elements? As we saw in the last chapter, without managing these elements, at best Joe would have a much longer decision cycle (as we saw above); at worse, he’d lose his initiative altogether.
Of course we saw in the initial role play how vulnerable the whole initiative was.

Looking at the entire system, Victoria has a choice: She can stand back and let Joe get on with his process, or she can lead him through the issues in the system that need to buy-in for a product purchase to be made.

From you.

Because Victoria has a history of working in this environment, she knows the probable systems elements Joe will need to include on his way to a buying decision.

The criteria here are to make it possible for Joe to know how to obtain early, easy buy-in, manage any work-around issues, and plot a path forward.

Follow on activities:

1. Joe meets with Victoria for two hours and puts a road map together to handle each piece of the buying decision and get the Buying Decision Team on board.

2. Joe meets with each member of the team individually and poses the following Facilitative Questions to obtain interest for a project.

3. By using these types of questions, and with the support of the vendor to manage each of the strategic and tactical points they need covered, Joe was able to align the team after one meeting, and get them to buy in to a presentation with the CFO about what they wanted from a website, from a vendor, and from the tech team.

4. The team decided they wanted an external vendor to do the entire project, with the tech team just managing the documentation and follow-on support.

5. The team met with the tech group, found out that they were six months behind with their work, and had no knowledge of SEO or Sales 2.0 tools.

6. The team met once with Victoria and one other vendor, choosing Victoria because she was more aware of their issues, familiar with the team, understood the need for collaboration, and they knew that she had helped Joe with the great questions.

7. The team met with the CFO and did a massive presentation on the outcomes, time critical elements, and cost/benefit analysis of hiring an outside vendor to do the whole thing. She refused to fund the initiative, and demanded the use of the in-house team as much as possible for testing, programming, or research if the decision team decided to bring in a web design vendor.

8. The decision cycle took three months; it might have taken less time if Victoria had been contacted earlier.

WRAP UP

By using Buying Facilitation® on the first call, Victoria helped Joe recognize many of the issues he’d need to address—many of which he hadn’t even realized at the start. Because he was new to this type of situation, and Victoria was familiar with the sorts of issues people in his position generally had to manage (i.e. because of her knowledge of the field, she was familiar with the probable systems issues), Joe was able to bring forward many problems and considerations he couldn’t have known on his own until he’d stumbled on them.

Victoria used each phase of the sequenced decision cycle, through each idea, initiative, relationship, budget...
issue, that the system might resist or object to, and from there, down the steps to getting buy-in from teammates quickly.

As a result, the entire process was easier for Joe and his teammates, quicker, more direct, and more targeted, with clearer understanding of the full range of issues within the Identified Problem and a greater chance for success. And Victoria was the coach and support, leading Joe through his change issues and while maintaining the integrity of his system. She did it by serving his decision process, not by supplying a solution. She barely pitched. And yet her solution was built into his decision.

**MANAGING THE BUYER’S DECISION: THE VENDOR’S STORY**

Previously, we viewed the case study from the buyer’s perspective, with a good peek into the sorts of decisions and relationship problems we’re not usually privy to. We got to watch how the necessary levels of buy-in got managed, as well as the relationships, the confusion and all around crazy stuff that had to be managed in order for the buyer’s system to be willing to change.

I’m also sure you noticed how initially Joe had no consistent criteria for ‘success’ or ‘excellence.’ Everyone seemed to be in their own little world, with no special way to work together for the good of the company, not to mention no one even realized there was a problem.

Indeed, until very late in the decision cycle, there were no criteria for how to choose a vendor, which was especially disconcerting since the vendors had already done two presentations based on how they could address the perceived need without understanding how they’d be chosen.

This happens all the time—and we go along, haplessly thinking that if we understand needs, earn trust, and have a great product to present, we’ll be a viable choice.

I hope it was obvious how mysterious this was for the buyer, who had no idea when he started where he’d eventually end up. I hope it was equally obvious that doing a sales job and attempting to understand the buyer’s needs would not have helped Victoria sell, nor helped the buyer buy.

In this section, we’ll walk with Victoria down the vendor’s path—in the first sales scenario, and then again in her role as a decision facilitator.

In the conventional sales situation Victoria was lucky to have been chosen; she certainly was not chosen on her solution per se. In the Buying Facilitation® dialogue, Victoria became a servant leader and neutral navigator, got onto the Buying Decision Team, and helped the buyer’s unconscious, unknown, and absolutely vital future decisions get made effortlessly and early enough in the process to involve the other team members early on.

Enjoy. You will get good insights into what you’re going through in sales, and show you another possibility.

**THE FRUSTRATION OF THE VENDOR—A TYPICAL SALES SITUATION**

*How Typical Consultative Sales Would Manage This Situation*

Your name is Victoria Tabor, and you own a web design company. You specialize in creating and maintaining sites for corporations.
You received a call from a prospect—so nice when the calls come in! Joe is from a smallish manufacturing company. He asked you to come in and give a presentation about what you could offer. He was very accommodating: He was willing to set up a face-to-face appointment for you to come in and gather data, to make sure that you were going to present exactly what they needed.

You visited Joe’s site, and spent a good hour with him, hopefully exhibiting your professionalism. Here are questions you needed answered:

1. What did their current website do for them? What more did they need?

2. What more would they like their site to do for them in the way of:
   a. branding themselves and their product;
   b. increasing their presence: on blogs, at the top of search engines;
   c. bringing in new customers;
   d. selling product online;
   e. differentiating themselves from the competition;
   f. creating a social space for customers to discuss their experiences and ask for what they need;
   g. enhancing the message of the company, and start motivational conversations that would position the company as an innovative brand for the future.

3. Is Joe the buyer? Who is the executive sponsor? Who are the decision makers on the project? How does the decision get made?

4. Who else are they considering for the job?

(Private note: the data were given to the three vendors who asked for it.)

Along the way, you learn about Joe’s frustration with the current site design and the internal tech group, and why he doesn’t want them to do it anymore. It should be easy to prove to them that your site designs are better than the current one.

You also find out that your regular local competitors have also been invited to present. But you had such a good meeting with Joe that you think you have the edge. After all, your site designs have won awards. You’re the best.

You presented to Joe the next week. Following your presentation, you were told you’d hear from Joe in about a month. After two months waiting to hear from him, you start calling to find out what’s up. Joe says that he’s not quite ready to make a decision, and that you’d have to come in and meet more people in a month or so. Good. You made it to the next round.

When you go in for the second presentation, there are more managers there. You expected to see the sales and branding managers, and were a bit surprised that the tech manager came as well. That can’t be good—he probably will want to compete with you, steal your ideas, and prove that he can do the job better. You wonder if
he’s attending the other vendor’s presentations as well. And you have no idea how much data about your ideas to reveal.

Following the second presentation, Joe again tells you he’ll call you back in a month. You don’t hear from him, and call after six weeks to find out if you got the job. Joe doesn’t return your call. You wait another month and call again. Joe still doesn’t return your call. Shoot. Looks like you lost the job.

Five months after your last presentation, Joe calls you to come in again. Thank goodness you’re still in the running. This time you put together a very specialized presentation that shows exactly how you would increase business. And just to add something new, you throw in one power point explaining how you’d work with a team, just in case the tech team ended up being involved in some way.

Two weeks later you get the job! It isn’t the job you had hoped for: They only want you to do site design, oversee the tech team’s implementation, and be there when it goes live. So it’s only a fraction of the business. But you’re glad you got chosen.

Sales Discussion

As the chosen vendor in this scenario:

1. You had three presentations over nine months and weren’t chosen until weeks after the final presentation.

2. Your presentation was focused on your service without having begun a leadership relationship with the prospects.

3. When you put the presentation material together, you had no way of knowing that their number one criterion would be your ability to collaborate and communicate. Your presentation materials and info gathering was based on their need for a professional corporate design. You got lucky by throwing in that one power point. Had you known, you would have done most of the power points around your history of being part of client teams.

4. You have been offered no choice but to do only the web design part of the job.

5. For your project, you only have access to the in-house tech team and Joe, the marketing manager. All innovation and decisions would be filtered one level down.

TYPICAL DECISION FACILITATION SCENARIO

How Buying Facilitation® Would Manage This Situation

Your name is Victoria Tabor, and you own a web design company. You specialize in creating and maintaining sites for corporations.

You get a call from Joe, and begin by helping him figure out all of the elements he needs to address. The first discussion point is about the tech team: You know that companies would much rather use their in-house suppliers or familiar vendors than go find a new vendor. Since there is already a website, there must be some sort of web design or tech team that they have been using.

You understand that until Joe and his team figure out if the current tech people will handle the situation, you don’t want to spend time putting together a presentation.
You also know there are more decision makers than Joe. There is no need to present until you can get the whole together, and they are ready, willing, and able—with budget—to choose an outside vendor.

You must help Joe figure out how to manage the relationships with his teammates and help them work together, plan together, and coordinate efforts to engage and influence the CFO if they decide to seek an external solution. There must be so many internal politics involved between the sales, marketing, branding, and customer service groups!

You would imagine that given the symmetry between these groups, they would be working together regularly. But you know that if they don’t figure out a way to work together, they will start playing games and use company politics to leverage against each other. So you lead Joe into helping the managers work together.

Once the team knows how to work together, they must decide if the current vendor, in this case the tech team, is going to do the work. Until or unless they come up with a joint decision to choose an external vendor, they will continue using their in-house tech team.

One more thing. You want to become part of Joe’s Buying Decision Team. If he starts relying on you to help him—and the team—make the sorts of decisions they need to make to get to some level of excellence, you will have proven yourself to be a leader and be relied on to help with other tech decisions. Sure, you’d get more work, but you’d also get a new referral: Joe would be willing to do a video referral for your site.

Buying Facilitation® discussion:

1. Victoria is on the Buying Decision Team from the first call.

2. There was no need for Victoria to put together a presentation before the whole team had decided to investigate an external supplier.

3. Joe agreed to hire Victoria to help him garner team buy-in: If the team didn’t buy in, or if the CFO wouldn’t go outside the system, Victoria would have gotten paid for her time and would have been saved three unwarranted presentations.

4. Victoria understood the difficulties and the probabilities of the sale on the first call.

5. Victoria and Joe spoke regularly. When Victoria finally presented, she knew the decision team’s criteria for choosing a vendor. She did not have to make a presentation solely based on her solution but was able to weight the presentation around her ability to collaborate. She entered as the favored vendor: She was part of the Buying Decision Team from the beginning.

6. In her first call with Joe, there was no pitch: The entire conversion facilitated Joe’s buying decision. It was unbiased, and led Joe through teach of his decision points: Where are you/What’s missing; How can you fix the problem with a familiar solution’ What elements need to be included to ensure that the system will remain intact once the solution is adopted?

**USING SALES METHODS**

When sellers use sales methods, it’s impossible for them to lead buyers through all aspects of their buying criteria. And, left to their own devices, the buyer rarely knows the complete set of criteria until the middle of the buying decision.
In this case study, there was no way for anyone to know if this project would allow an external vendor in to provide a new solution. If:

- the management team couldn’t work together, decide together, and present together,
- the management team couldn’t figure out a way to share budget,
- the tech team ended up doing all of the project,
- the CFO wouldn’t agree to a site redesign at this time,
- the CFO wouldn’t offer budget or all allow managers to find their own funding, and
- the tech team didn’t want to collaborate and made a fuss with the CFO, there would have been no job.

And Victoria would have made two or more presentations unnecessarily—wasting all of that time and effort.

None of this could have been understood upfront. Unfortunately, sellers are brought in to present too early in a project, and end up waiting while the buyer figures out how to manage what cannot be known at the start of the project idea. And the seller’s time is wasted—often.

Remember: An Identified Problem (in this case, the inadequate web presence) is already an integral, accepted part of the culture before being recognized as problematic. So there is no ‘need’ per se or they would have fixed it already.

We must also remember Sellers are brought in that until all of the systemic elements that have created and to present too early in maintain the system are ready, a project, and end up willing, and able to manage the change, no decision to fix a waiting while the buyer problem will take place. No figures out how to matter how large or important the need, as we perceive it. And manage what cannot be no matter how determined we known at the start. Are that we should be fixing the need with our solution.

Indeed, we’ve factored all of this failure into our sales approach until now, and, like with any system, have worked around the inadequacies and made accommodations to the low close rates and long sales cycles. Indeed we have developed more and more work-arounds through the years. But it’s broken. And we have a way to fix it.

Next section, we’ll break down each aspect of the facilitative dialogue between Joe and Victoria to understand how the model created the results, and why. We’ll also understand what she said to get onto the Buying Decision Team, and how she remained in the decision facilitation process before pitching.

Compared to sales, it might look too good to be true. Think about what you would have done, and where that would have gotten you. And see how facilitating the change management process gets you farther, faster—and gets the buyer farther, faster!—than using the typical sales tools.

**LEADING THE BUYER THROUGH THE BUYING PROCESS**

Now that we are acquainted with the scenario, the problems, and the possibilities, let’s break apart the entire Buying Facilitation® dialogue and better understand how Victoria facilitated Joe’s ability to influence his team, and made a bigger sale than she would have without this model.
Once again, remember that buyers have to do all of this any-way—and they can do it with you or without you. With you means that you will have some influence on what happens, teach your buyer how to manage all of the issues he might not have realized needed to be managed, get onto the Buying Decision Team, and be a servant leader to your buyer. Not to mention close faster, close more, and make the process much easier on yourself.

THE BUYING FACILITATION® DIALOGUE REVISTED

JOE: I’d like to speak with someone who can provide me with information about doing a web design for a $15 million company.

VICTORIA: I can help. My name is Victoria. Who am I speaking with please?

JOE: I’m Joe. Are you one of the designers?

VICTORIA: I am. Do you mind if we spend some time speaking? I’ve got a bunch of questions to ask, and am happy to make an appointment to do this at a more convenient time. We’ll need at least 30 minutes.

Victoria begins the process of getting into rapport by getting into collaboration and agreement to start, immediately letting Joe know he’s in good hands: She respects his time, and takes a leadership role, and immediately begins the process of helping Joe figure out the issues he’ll need to manage internally before he could consider purchasing anything from her. Joe knows what Victoria is selling and there is no need for her to discuss her solution until later when/if the decision team agrees to move forward.

Victoria is also managing the direction of the conversation; by taking it over, Joe becomes the responder rather than the questioner. This gives her the control to maneuver Joe through each stage of his decision phases, some of which had not yet been considered.

To do that, she needs to get him to detach, somewhat, from his biases so he can begin the process of seeing the entire landscape of issues in front of him and starting to make some of the decisions he needs to make. If these don’t get made—and Victoria can’t do it for him of course—she would end up wasting her time pitching, presenting, and following up for a long time.

JOE: We can do this now. Do you want information about the company? About our current site?

VICTORIA: Not yet. I will though. But a bit later. Can you tell me something about how you currently get your site designed and administered?

Victoria has just taken control of the conversation, and begun the process of keeping Joe on track, working one small bit at a time to begin to get him into a more observer mind set, while gathering the bits of systems data she needs to formulate her facilitating questions. Everything he wants to share with her will be heard in time.

This first query addresses the first stage of the buying decision cycle:

Rule 1

Until the prospect can see/understand the full range of systems elements that live congruently within their culture, an Identified Problem is not seen as something that is ready to be resolved—regardless of the cost to the system.
Victoria begins by asking a question about the status quo. She needs them both to understand how the Identified Problem is maintained in the system so she can begin leading him through the elements he needs to start considering on his way to getting his team’s buy-in to choose her solution.

It will be obvious to both Victoria and Joe that if the site design has not been updated until now, there are internal, political issues keeping it in place that will need to be influenced. At this point, Joe cannot see all of the issues that need to shift because the current site design—the Identified Problem—is being accepted in the system as being ‘fine.’ And Joe is just one member of the Buying Decision Team. He cannot get a new web design brought on his own and must discover all of the people and policies that have maintained the current design.

From this first question, Victoria will learn if Joe is working on his own, if there is a regular tech vendor to do an upgrade, and if this group can do the work for Joe. If this group can handle Joe’s need, she also needs to know why he’s calling her, and what is stopping him (and the others) from continuing to use this group to do the site redesign.

How viable is using the current tech team? How ready are the other members of the Buying Decision Team to act on upgrading the site, if they haven’t bothered until now?

If there is a huge bias to continue using the group that has done all of the work until now, or if the collegial network doesn’t want to change and she can’t help Joe and the Buying Decision Team re-examine how the current system has maintained their status quo, she’s probably not got a shot at the business.

JOE: Sure. We have a tech team. They’ve been handling it for about four years now. But I think it’s time for us to get more professional so I’m seeking a vendor who specializes in site design. I saw your stuff on the net and was impressed.

VICTORIA: Thanks! So glad you liked it. We are happy with our results also. I’m wondering how your tech folks are going to handle giving up a job they’ve been doing for years. It must be a part of their work load.

Victoria poses Facilitative Questions to help Joe determine the issues he’ll have to manage, starting with how to change the system by getting buy-in from his colleagues. It seems like she’s going to have to compete against the internal tech team—bad odds for an unknown vendor.

She understands that the system will attempt to hang on to their current provider, especially if it turns out that no one has ever challenged the current tech provider before.

Rule 2

Until the prospect explores all obvious, familiar ways to find a solution without choosing a new vendor or product, they will make no decision to buy anything new.

JOE: I’m not sure about any of it. I haven’t spoken with them yet. I thought I’d speak with a few of my business partners and get the lay of the land before speaking with the techies.

This is trouble. Joe needs to know this. All of the business partners must be on board, and the high ranking decision makers who originally gave the tech team the responsibility to design and maintain the site are going to have to come to a new decision. And everyone is going to have to take the tech team into consideration as part of their decision process.
VICTORIA: Do me a favor? Let’s put that question on a parking lot, because it will be one of the questions you might need to address when you sit down with them. Not only are they going to be giving up some of their work, they’ll have to support an external group and work together with them. Not necessarily a happy situation. Not to mention that people in your company have gotten used to them, and they are doing successful projects with a lot of the internal teams. It’s a very sensitive subject. So let’s get that down on paper and we can come back to it once I ask a few more questions.

Several things have happened here.

1. Victoria began teaching Joe about the work he’s going to have to do internally.

2. She is proving herself to be a real asset—Joe doesn’t know any of this yet (although as you saw, he’d find out soon enough) and she’s saving him time and giving him perspective.

3. She’s proving that she really cares about Joe’s issues, and is using her time to serve him rather than pitch her product.

VICTORIA: What has caused you to determine that an outside vendor would give you more capability than your current tech team? They must have been doing a good job if you have kept them for four years.

Victoria must ask a question after giving that mini lecture to maintain control of the Buying Decision Funnel. Otherwise Joe would start getting into the company politics and more detail than either of them need now. And her question here is very important: Joe and the Buying Decision Team absolutely must know how to NOT CHOOSE their current vendor; the tech team is currently the familiar resource and chosen vendor.

JOE: I’m relatively new—only been here for eight months, so I inherited them. And I really think they are so inexperienced at the more sophisticated aspects of web design that it’s actually harming our business.

VICTORIA: And since you haven’t spoken with them yet, you’re assuming they won’t be able to prove to your satisfaction that they can do better, or you wouldn’t be calling me.

JOE: I am assuming that, but of course I’m going to have to give them a chance to prove themselves. They haven’t excited me yet, but I do have to give them that chance.

Here is a very important fact: As suspected, the tech team is the favored vendor (All familiar resources are chosen first, remember.) Victoria has to help Joe and the rest of his currently non-existent team understand their choice criteria.

Obviously everyone else seems to be comfortable-enough with the current site. She needs to help Joe get the appropriate people to either change their criteria for site design, or change their criteria around the sorts of results a different design would give them. At this point, there is no way to know if the tech team can develop a better site, or if they have the time to do it. And there is no way of knowing the budget issues.

Victoria has moved to the final decision phase. Victoria really must help Joe get the other decision makers onto a functioning team that can figure out how to make sure everyone gets what they need and avoid fallout if an external design team comes into the company. Otherwise, there really is no job here for her.
Rule 3

Until or unless all elements of the systems that touch the Identified Problem have bought-in to a new element entering the system, nothing will happen for fear of systems imbalance or systems disruption.

VICTORIA: And it appears that the others on your decision team haven’t minded their output or you all would have started looking for a new vendor before today.

JOE: Right. Most of the partner groups don’t talk to each other—you know the normal marketing/sales rift, and the brand manager thinks he’s above us all. I don’t think anyone wanted to tackle the problem because it’s been good enough until now.

This is an obvious problem that Joe will have to manage. Victoria can lead him through the process, but he will have to bring them all on board before the project can begin.

VICTORIA: And what made you stop believing it was no longer ‘good enough’? This will help both Joe and Victoria get Joe’s buying criteria.

JOE: I’ve been closely following our daily, weekly, and monthly hits, as well as those of our competitors, and noticing that we are beginning to trail. Not to mention that we aren’t doing SEO and adwords and social networking. We’ve got a lot to do to catch up, and I think it’s time now.

VICTORIA: So you want a site redesign, you haven’t spoken to your tech team, and your Buying Decision Team hasn’t started working together yet to determine what they might want to do, or even if they want to do anything different. And none of you know how to work together. Given all that, I wonder how the team will know how to work together to determine if they think it’s time to bring someone new in?

Victoria has just given Joe a tactical overview of all that he must accomplish before he can bring in a new vendor. It’s very tactical. But the last Facilitative Question is vital: Joe must get the team to work together to make a new set of decisions.

JOE: I’ll have to do a presentation and get their attention. Of course I’ll have to get their agreement to start moving forward. I think if I just stress that we need to form a collaborative group to get the best site design for us all, they’ll buy in. But they aren’t the biggest hurdle. We’ll have to get agreement from the CFO because there is no budget, and because technology reports to her.

Now that I think of it, I guess I’ll need the buy-in from the other managers in case we have to get funding out of our individual budgets. I have been trying to get us all on the same page. It’s been a challenge.

Ah. Another wrinkle! Joe needs to get several levels of buy-in from the other departments and the CFO. They will all have to approve of the project, the funding, and the implementation group.

VICTORIA: I hear that there are a lot of people and departments who have a preference for keeping the tech team doing the work. Given the issues you’ve had with the other departments, what do you plan on doing differently to get their buy-in to either get agreement from the CFO to work outside the tech team or get her to give you budget?

Joe absolutely needs the answer to this. He’s got nowhere to go otherwise, and his desire for a better site will come to nothing.
JOE: Haven’t gotten that far yet. What do you suggest?

*Joe has just put Victoria on the Buying Decision Team. She’s become his coach. And indeed she’s been coaching him all the way through.*

VICTORIA: It’s a good thing to realize that until all of the team members buy in to getting a new site design, or using an external vendor, or choosing to use the in-house tech team, the decision will be delayed. Especially if you end up needing the CFO’s agreement and you’ll need to join forces and provide a unified front to her. So a prior relationship and joint vision is very important.

Let’s put a few of these questions on the parking lot. 1. how will the team decide to work together; 2. how will they know that doing the redesign will actually bring in more money (I bet the CFO will like that one), and 3. what will each group want to walk away with to ensure that it will be worth their time and effort.

*Victoria is doing a fine tactical coaching job. And Joe trusts her. No reason not to: Her ideas are sound, and every comment is directed toward helping him make his best decisions. And there is no manipulation going on; at no point is Victoria setting Joe up and wending her way back to her product. She is really, truly, serving the client.*

Note that by now, she’s only 20 minutes in to the first conversation. If this is going to work, Joe has a lot to do on his end to gather the folks who need to buy-in to using an external vendor. If it’s not, Victoria doesn’t want to waste her time.

JOE: That’s a good start for me.

VICTORIA: We’ll also need to figure out a business case in case your CFO won’t give you any money and you decide to use an external vendor for all or part of the new site.

I have another question: How will your CFO decide to allow in a new vendor when one of her reports is the tech manager?

*They must have the answer to this or there is nowhere to go.*

JOE: I don’t know the answer to that. I just put it on my parking lot. We need the answer to that, don’t we? She really protects him, and I don’t see her letting it go—maybe the front end design, but certainly not the implementation and programming. And that’s the part that they won’t have time to do—I know how backed up they are.

VICTORIA: I suspect she’ll try to get the tech team to do it so long as she doesn’t have any price or time criteria that would make her think otherwise. She’d need to believe there was a business case for bringing in an outside vendor, or at least believe there was a possibility that the tech guys couldn’t do a good enough job to keep up with or surpass the competition. But it seems by her actions with the current site, she hasn’t cared about that until now.

*These are very important tactical points. Victoria is laying out the systems issues she understands (of course she can’t understand the content—the specifics—because she doesn’t live in Joe’s company). Note that she’s making a case as to why they can’t bring in a new vendor. And it’s a valid point. She is actually helping Joe determine what needs to be considered internally before knowing whether he CAN or CANNOT choose an external vendor. He’s going to do this anyway—with her or without her. She’d much rather know now than after several presentations.*
JOE: Is there any way that you could create a project in which you would do the web design and they could do the programming? That might make it easier to make a case with her. At least we could have that as a fall back position.

VICTORIA: Sure. We could do the web design and your internal folks could do the programming and the testing and the implementation. And we could oversee it as a project.

This is not what Victoria wants—a piece of a job. Not to mention the frustration of working with an in-house team that has other time constraints and resentment that they didn’t get the whole job. But she’s got to be where Joe is and lead him beyond that. So Victoria has to have Joe really look at that decision from an unbiased viewpoint.

VICTORIA: How would your Buying Decision Team know that we could give you a great design, manage the internal politics given that there may be competing needs, and work alongside your tech team collaboratively?

Victoria is now at the point where it’s time to have Joe discuss how he’d choose her. She’s proven her leadership skills; she’s gotten Joe’s trust as he uses her to help him make decisions; Joe now clearly knows the work he’s got to do, and he knows how they’d have to position her with the rest of the Buying Decision Team (which doesn’t even exist yet).

JOE: I’m assuming you’ve done all that before? And you have references?

VICTORIA: We do. And we’ve been doing a lot of that shared work in this economy.

What would you and your decision team, including the CFO, need to know from or about us, to know that it might be worthwhile to have a conversation?

Notice that Victoria did not leave her direct response without adding a question: If she just responded without adding the question, Joe would be in control of the conversation.

Victoria is willing to do a presentation—but only to the entire team. And of course, Joe may not be able to put together the team. If he can, it’s an indication that they are willing to look outside for a solution. If not, she will have spent 30 minutes on a call and really helped someone think through his choices, and saved herself a year’s worth of following a prospect that is going nowhere.

JOE: First I need to sit down with them all, and sit down with the CFO and ask her some of the questions that we have on our Parking Lot, and show her your site. Then I’d need you to come in and talk with us.

VICTORIA: I’d like to know that the entire team—except the tech team, who I think we should have a separate meeting with, after everyone else is on board and open to the possibility of bringing in an outsider—would be there, so we can see where we are at. What would you need from me to help you have the best possibility of getting agreement from your teammates and your CFO to move forward?

Joe is now formally asking for Victoria’s help. She is really clear that she’s not going to be involved unless the entire team will be.

JOE: I’d probably want your thoughts about whether or not to have private conversations first with each of them, or start with the CFO, or have you in to do a pitch first to get them excited.
VICTORIA: Having me in first wouldn’t make sense—if they didn’t want to move on it, I would be a reason to object. Let’s put together a plan of action. How would you like to do that?

She’s making a sale here. And he’s ready to buy.

JOE: How ‘bout if I come over there, and we put together a plan. I’d be happy to pay you for coaching me through this—I don’t want to abuse your time—and then we can figure out the steps we need to take.

Victoria is assured some work, and a good possibility of being the chosen vendor if that becomes a possibility. She didn’t have to go through all of the face visits (This was all done by phone.); she didn’t have to wait for 36 weeks; and she isn’t in the dark—she knows the entire buying decision process, although of course can’t know the day-to-day personal politics and jockeying that will go on.

SUMMARY

I hope it was obvious that there is a difference in the skills between those used by Victoria in the case study above, and the typical sales conversation. Victoria was a true servant leader, and led Joe through all of the decision issues he needed to manage.

Notice how the conversation stayed in the systems-decisions end of the buying decision, not the solution placement end. It actually led Joe through all of the decision issues he was eventually going to have to work through, eventually focusing on the big one: If there was a choice to bring in an external vendor to do the design work, she would make her sale. Otherwise, Joe would discover right away that it would never happen.

In addition, Victoria actually helped Joe set a course through each of the elements he’d need to manage. If she had concentrated on selling her solution rather than helping maneuver Joe through his change issues, she would have had the same situation as the first sales interaction.

Although Victoria couldn’t be in each of the follow-on meetings, and certainly couldn’t know the relationships or the personalities, she understood the system of what needed to take place. She helped influence the route through the people and policies, and the job descriptions that would need to be involved for there to be buy-in for a project to move forward. She took a leadership role—a Buying Consultant, or a Buying Facilitator.

Victoria also actually never discussed her solution, and used Buying Facilitation® during the entire conversation to lead the prospect through the range of buying decisions he was going to have to make, including getting partner buy-in, getting the CFO on board early, and getting the tech team to partner instead of being hostile.

Until Joe did all of these things, he couldn’t hire a vendor anyway. Indeed, if there was no buy-in from the partner managers, and the CFO wouldn’t come up with funding, Joe would have had no way to go outside the system to bring in a new vendor.

As was obvious, the buyer couldn’t have known what was going to happen in advance, and the seller was in the dark until the end of the long process. Starting a sale from the point of helping guide the elements included in a buying decision requires new skills, mainly to help a buyer do what needs to happen to choose you.

Just remember, that until or unless the buyer can figure out all that needs to happen before anything can happen, and until there is buy-in, we can’t make a sale.