



TRANSFORMING THE RELATIONSHIP LANDSCAPE

PARTICIPANT WORKBOOK

Hallett | training
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Introduction

According to Gartner, the typical buying group for a solution can involve 11 stakeholders in complex B2B enterprise sales.

Very often we can find ourselves chasing after a big deal...and then it goes dark. One of the biggest reasons this happens is because we failed to engage all the influencers for that particular sale.

There are many different influencers. They all play different roles in the purchasing decision. Some have a lot of influence...others have less influence. Some have a favorable attitude towards us, whereas some may prefer our competitor.

If you want to increase your chances of winning the deal, you need to identify all influencers, have a clear understanding of their position, and improve your relationship landscape.



Here are some of the most common roles influencers may play in the purchasing decision:

Economic Purchaser



Role: To give the final approval to make the purchase

- Only one per sale, but it could be a team or committee
- Authority to release funds
- Veto power

Focus: Bottom line and impact to the organization

Asks: How will this affect the business?

Technical Purchaser



Role: To screen out and get to a short list

- Often several or many involved
- Evaluates measurable aspects of your proposal
- Gatekeepers
- Can't say 'yes' but can say 'no' and block you

Focus: Specifications and decision criteria

Asks: Does this meet the buying criteria?

User Purchaser



Role: To judge the impact on job performance

- Often several User Purchasers involved
- Uses your solution on a day-to-day basis
- Direct correlation between this person's success and the success of your product

Focus: The job that needs to be done

Asks: How will this work for me in my job or department?

Champion



Role: To act as a guide for the sale

- Has a personal interest in your success
- Has influence & credibility within the organization
- Provides insights on what will influence others

Focus: Ensuring your success

Asks: How can we win this together?



Champion

Champions can be spotted as they are well accepted by their peers, are very influential, and have a good track record of successful projects that make them visible in the chain-of-command.

Champions are often confused with coaches and supporters. Here are the differences amongst the three:

Champion

A champion is a person who has influence, will sell and maneuver on your behalf

Coach

A coach provides you information to win, but will not actively or openly fight for you

Supporter

A supporter will vote for you, but avoid giving you an advantage before the vote takes place

Developing a Champion

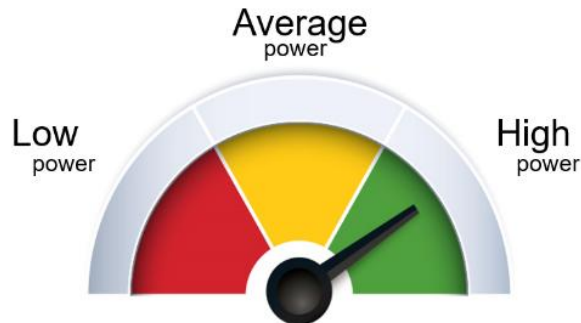
- Enable them on how to address the pain, (i.e., link them to the subject matter experts of your company)
- Set up a cadence where you regularly check in on them
- Spotlight them on social media and celebrate their wins
- Provide resources - Invite them to the right seminars or link them together with your references so they can learn from their experience handling projects

Testing their Support

- They return your phone calls
- Share inside info or private insights
- They can get you to other stakeholders
- They can answer..... Why Buy? Why Us? Why Now?

Influence

You should consider the level of power and influence of each player. Not all contacts are equal. Some people have a great deal of influence in a purchasing decision, while others have minimal influence over a deal.



Identifying Power & Influence

The following are 10 statements that can help you determine the level of power an individual might have. Read through each of the statements and check those boxes that you can answer “yes” to.

- ☐ Your contact is at a level within the organization that enables him/her to exert influence on others
- ☐ At meetings, this contact commands attention from others
- ☐ During the sales cycle, others refer to this contact as an opinion/thought leader
- ☐ If needed, this contact has access to those in a senior position in the organization
- ☐ This contact is knowledgeable about the buying process.
- ☐ This contact can articulate the strategy of the company and what is at stake with the opportunity
- ☐ This contact can state the business value and impact that the solution provides the company
- ☐ This contact can clearly define all buying criteria associated with this opportunity.
- ☐ This contact is considered a high performer
- ☐ When the individual speaks, the others in the room are carefully listening

Scoring

If you checked more than 7 boxes, this individual most likely has a high degree of influence.

If you checked between 4-6 boxes, this individual most likely has medium influence.

If you checked 3 or less, this individual most likely has low influence on this purchasing decision.

Attitude

It is also important to consider each stakeholder's attitude – whether they are positive towards us or negative towards us in comparison to another vendor.

Friend - Very keen for us to succeed. Will not consider any other vendor.

- Will advise you about who to meet, agendas. Issues, progress, shape of the offer, etc.
- Believes in your offer and you. May have had success with you before.
- Has credibility in the organization.

Supporter - Is quite positive towards us, more so than towards another vendor.

- If asked, they will back you.
- They may promote your solution.

Neutral - Neutral in attitude to us. Open minded towards us and other vendors.

- May have no opinion.
- May believe two or more vendors are equally balanced.
- May have decided to adopt a neutral position for political reasons.

Resistant - Is unfavorable towards us as a potential vendor.

- If asked, they will express concerns.
- May be concerned about your offer or they are more in favor of a competitor's offer.

Foe - Will oppose you at every opportunity.

- They actively work against you.
- May be against your offer or strongly in favor of a competitor.
- May have personal, commercial, or technical motives.



Application Exercise: Assess the Decision Making Team

Select **one opportunity** you are currently working on. Consider all the players who have influence over this particular purchasing decision.

- Who are the **key players**?
- What **role(s)** is each stakeholder playing in this purchasing decision?
- How much **influence** does each stakeholder have (for this particular purchasing decision)?
- What is the **attitude** of each stakeholder (towards your company)?

Complete the chart below. If you’re unsure of a particular area, then put a “?” in the box.

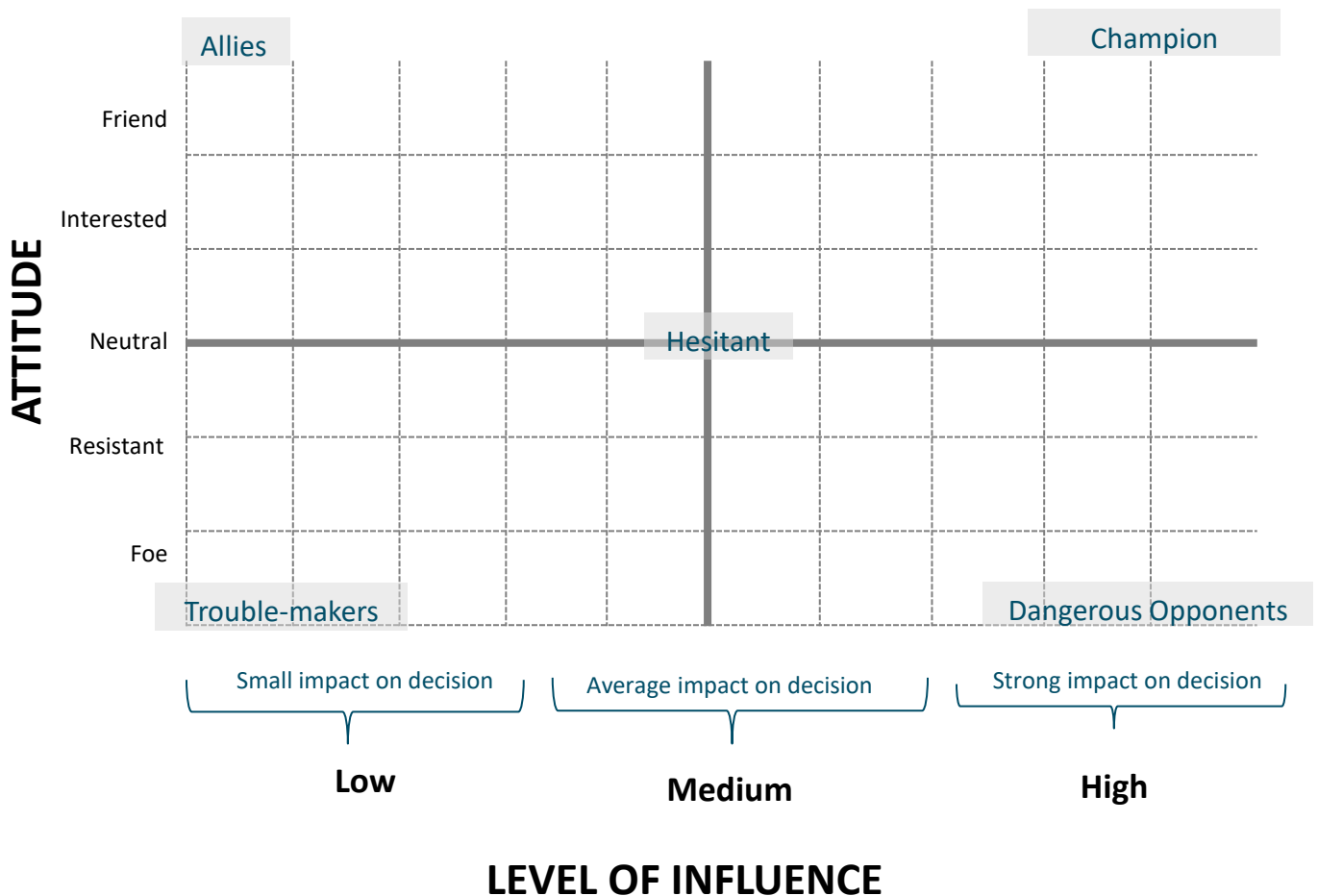
Key Player (Name and Title)	Role(s)	Influence (Low, Medium, or High)	Attitude (Negative, Neutral, or Positive)

Application Exercise: Map the Decision Making Team

After assessing the different players on the decision making team, the next stage is to plot each player on the grid below. As you plot each player, be sure to **plot their name, title, and role**. After completing this portion of the exercise, you will have a holistic view of the decision making landscape for that particular opportunity.

Opportunity:

Your Primary Contact:



Application Exercise: Develop Strategies to Improve your Position

Risk Indicator = anything that could threaten your sale.

Examples of Risks Indicators

- No next step
- Uncontacted influencers
- Stronger alignment with competitor
- No impending event

Examine your landscape of the decision making team:

1. Identify risk indicators that exist within this opportunity.
2. Discuss strategies on how you can manage and improve your current position.
3. Develop a concrete action plan that will help you improve your current position.

Checklist: Assessing the Strength of the Deal

Metrics

- ☐ What are the top 3 metrics that our solution will impact for the customer?
- ☐ What are the specific measurable results that the company expects to gain from doing business with us?
- ☐ What degree of risk do they perceive in this potential sale?

Economic Buyer

- ☐ Who will have final approval authority for the sale?
- ☐ Have you met with the economic buyer? At what stage in the sales process?
- ☐ Have there been any recent changes in the lineup of key decision makers for this sale? Is there a new face on the scene? Do you understand his/her possible influence on the sale?
- ☐ Has there been any type of reorganization recently in the customer's organization?
- ☐ Are you certain that the person giving final approval for this sale has not changed?
- ☐ Have you identified all Decision Maker(s) and met with them?
- ☐ Who else will have influence over this sale?

Decision Criteria

- ☐ What are the top 2-3 criteria for the customer which will influence which vendor they choose?
- ☐ Do we have a concrete advantage over the competition on one or more of the criteria above? How so?
- ☐ Is this a strategic C-level or corporate initiative for the company?
- ☐ Is there a budget confirmed for the project?

Decision Making Process

- ☐ What are the steps in the customer's decision-making process?
- ☐ What do you need to know about whether my timing is right and the urgency is there?
- ☐ What political factors are going on in the customer's organization which could impact how this decision is made?
- ☐ Has a mutual action plan been validated with the client? Has the client been involved in co-creating the plan through making edits/changes?
- ☐ Has the customer explained the signature process? What are the steps? Timeline?
- ☐ Has the implementation date been confirmed? By whom?

Checklist: Assessing the Strength of the Deal (Cont.)

Identify Pain / Impact

- ☐ Is there a compelling event to buy a new solution? What is that event?
- ☐ What is the cost of doing nothing?
- ☐ Has either the main contact or the decision maker expressed strong pain if the new solution is NOT implemented?
- ☐ What is the impact on their business?
- ☐ Has the Economic Buyer validated the business value and ROI?
- ☐ Has the customer produced an ROI? Was it on their own? Or did they use our help?

Champion

- ☐ Do we have a champion in the organization who can provide us with important info for this sale?
- ☐ Do we have direct access to the decision maker or signer? How so?
- ☐ Do we have a superior relationship vs. the competition?
- ☐ Will the champion take the proper steps to get this over the line?
- ☐ What are you doing to help the champion see the value of your solution? What are you giving him/her so they can “sell” your solution internally?

Competition

- ☐ Who does the customer see as my main competition for this sale?
- ☐ What are the competitor’s primary strengths and weaknesses?
- ☐ What is the price differential between their likely solution and mine? Is price going to be a major factor to this customer?
- ☐ How are they positioned with the customer? Are they new players or are they firmly entrenched?

Why Us?

- ☐ What are the top 3 needs of the customer? What are the top 3 wants? What are the top 3 opportunities that they are excited about? How will we capitalize on these?
- ☐ Has the decision maker and main contact confirmed advantages we have? Why us?
- ☐ What are the top 3 risks within this deal? What is our risk mitigation strategy?