

The Direct Route To Closing More Sales, Faster, Through Mapping The Customer Decision-Making Process

Dave Brock, Partners In EXCELLENCE

Dimensions of EXCELLENCE™ is based on the four dimensions of performance and organizational excellence. These are the foundation for our development programs oriented to achieving performance and organizational excellence in sales, marketing, and customer service.

These white papers provide concepts and ideas based on the application of these principles of these programs and our work with our clients. We welcome your comments and observations on these topics.

For more information on our products and services, contact:

Partners In EXCELLENCE
 22715 Barlovento
 Mission Viejo, CA 92692
 PH: 949-305-7146
 FAX: 949-305-7164
 Email: info@excellenc.com
 www.excellenc.com

© 1997-2003 Partners In EXCELLENCE, All Rights Reserved.

Standard equipment for sales people is a good set of maps to help determine the best routes through their territories and to their customers. While virtually every salesperson can tell you the most direct route to a specific customer, how many of these sales people develop a map of their customer's decision-making process?

We've encountered thousands of sales people that, when pressed, cannot really articulate the process by which their customers will choose them, their competitors or some other alternative. Not knowing the customer decision making process is comparable to driving a random route to reach your customer: You may or may not reach your objective. If you do reach your objective, it is usually after wasting a lot of time and resources.

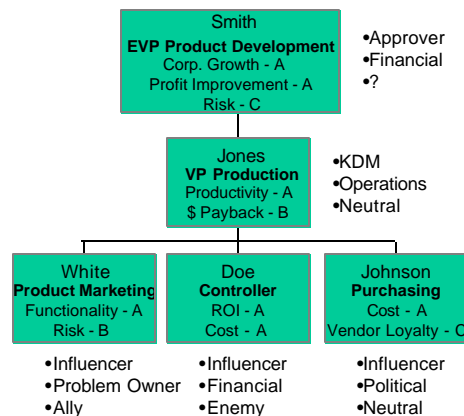
We have developed a tool to help the sales professional understand the most direct route to closing a sale. Using this tool consistently will focus you on the issues critical to your customer, help you identify the role each individual plays in making the decision, and identify critical people to call on to reach your goal. We have found that sales people using this tool create more value in their relationships with their customers and close more sales faster.

What is a Customer Decision-Making Process Mapä ?

The *Customer Decision-Making Process Mapä* identifies the following:

- The Key Decision-Maker (KDM), the Approver, and all Influencers in a specific sales opportunity.
- It identifies and prioritizes the key issues for each participant in the decision making process.
- It identifies the communications and decision-making style of each participant.
- It identifies the relationships between the participants.
- It identifies your relationship with each participant.
- It helps you identify whom you need to call on next and for what purpose.

Figure 1 identifies the *Customer Decision-Making Process Mapä* for a mythical manufacturing company.



Having the map, we can start to determine the actions we must take to close the sale. Should we call on Jones to demonstrate how our solution will give her greater productivity improvements than any other alternatives? Should we seek to convert her to an ally? When we call on her, we probably should not spend much time on cost, so long as we can

demonstrate that the payback goals will be achieved. What should we do with Doe? Can we convert Doe into a neutral or ally? If we do, our argument must be based

strictly on financial benefits and not on the capabilities of our solution. What should we do with Johnson? Can we move Johnson into an ally position? Because Johnson is very political, what influence will the others have on his recommendations? Clearly, White "feels the pain" with his problem and is our ally. Can White help us move our recommendation ahead? What if Jones pays more attention to Doe's opinion than she does to White's or Johnson's? When should we call on Smith and for what purpose?

Having the *Customer Decision-Making Process Map* enables us to clearly chart the most effective route to closing the sale. It enables us to focus on those people critical to the decision, their issues and priorities. We can clearly identify our exposures and opportunities to improve our position.

This is not an organization chart!

As sales people start to use this tool, one of the biggest errors they make is drawing the customer organization chart, not the *Customer Decision-Making Process Map*. In complex sales situations, many people across the organization are involved in the decision. Our job is to identify the key participants, to understand their role and priorities and to understand their relationship with the other participants.

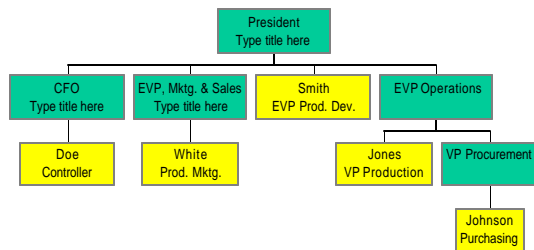


Figure 2 shows a simplified organization chart for our mythical manufacturing company. If we had tried to portray the decision-making process on an organizational chart, it would have been impossible. We may have wasted time on people not involved in the decision, not addressing the needs of the decision-makers. Or worst yet, we may have spent all our time with the marketing people (since White is the one with the problem) and totally missed our

key decision-maker (KDM), the approver and the others involved. What if our competition was spending time with them?

How do you start to build the Customer Decision-Making Process Map?

Like the companies that build the road maps we cited at the top of the article, we use map-making experts: our customers! Who better to ask to help you build this Decision-Making Process? Using our manufacturing company, ask White to draw the Decision-Making Process. Give him a pencil and paper and let him talk. Listen and probe to help him develop an initial view of the process. Don't stop there! Make sure you identify and prioritize the top 34 issues for each participant. Generally, not anything beyond these is significant to the decision. Identify their role and characterize their style. Are they financially driven? Operationally driven? Visionary and growth oriented? Politically oriented? Finally, what is your relationship with each? Are they allies? Neutral? Do they prefer the competitor or another alternative?

As you meet with others in the company (both those involved in the decision and those close to it) ask their perspectives of the Decision-Making Process. As you get the different views, consolidate them into one view. Use this to re-confirm the process with the participants (It is probably wise to keep the decision-making style and your relationship on your own private version of the map. Doe may not take kindly to being called the enemy!) Doing this assures that you focus your time on the people and issues critical to their decision, not wasting their time or your time on other areas.

Some maps are very simple. A single individual is the approver, key decision-maker and influencer. In this case the map is one box and can be done in your mind. More often, however, we find that most sales

people face very complex or confusing decision-making processes. Taking the time to draw the process on a single sheet of paper helps to simplify the process and improve effectiveness.

Hidden benefit to this process!

In developing this map with many of our own clients, we have found that they have not really thought about their Decision-Making Process! They may not have established criteria. They may understand the various roles in the decision. Often we find that we are in the role of helping them develop the Decision-Making Process. We become their consultants in identifying the critical criteria and helping them make the best decisions for their company. While some of the issues we identify may not be favorable to our solution, more often we find ourselves in a position of being most favored in the critical issues. Additionally, we have established the rapport and relationships with the key participant in the decision.

What next?

Becoming comfortable with this tool requires practice. Once you become comfortable with the basics outlined above, there are many extensions. Consider including yourself and your competition in the map. Both of you influence the Decision-Making Process! You can even include influence lines and other elements to further refine and improve the effectiveness of the tool. Share this with your teammates to determine how each person should drive the process.

Try using this tool in your next five sales opportunities. Then don't use it in the following five. Compare the results. Is your sales cycle shorter? Are you winning more opportunities? Are you focusing on the issues most critical to your customers and not wasting your time on others? Or are you doing a random walk through the selling process, relying on luck, or wasting more time and resource than necessary?

Like the using a road-map, you will find that *Customer Decision-Making Process Map* gives you the most effective and direct route to closing more sales, more quickly.

Customer Decision-Making Process Map is an element of the proprietary selling process established by Partners In EXCELLENCE and Sales Force Systems International. Specific techniques and extensions to the approach outlined in the article are available through seminars we conduct.

© 1997 Partners In EXCELLENCE. All rights reserved.