THE SALES EXPERIENCE:

A Detailed Guide to Workshop-Based Selling

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Introduction

We're all familiar with the concept of a differentiated customer experience – the touchpoints, environment, and personal attention companies like Apple, Disney, and Nordstrom are famous for providing. Perhaps even more so than the products themselves, people return again and again for the experience of being a customer.

Unfortunately, most B2B sales organizations struggle to consistently offer similar experiences during the sales process. But it is those very experiences that B2B buyers want. According to a recent study by Salesforce.com, 73% of buyers say their standards for how companies interact with them are higher than ever. And 82% of buyers want the same experience as when they make personal purchases.

So, what does a differentiated sales experience look like? What's it like to buy from a great sales rep?

For the past decade, marketing and sales have been searching to answer this question. We believe all this effort has been misguided. Yes, insights on your customer's business matter. In fact, they're absolutely necessary. But insights alone aren't enough in today's selling landscape.

What's most important is the overall 'buying experience'?

How your reps engage a prospect along their deciding journey matters. It matters far more than any insight. Our research shows that winning deals in today's environment don't follow any one approach. The right sales strategy is highly situational. Sometimes it's all about the insights. Sometimes it's about making the transaction easy or frictionless. And sometimes it IS about leveraging relationships (Gasp!). We're now dealing with a confusing and complex convergence of every major selling trend from the last 10 years:

- The emergence of B2C practices in the B2B environment, particularly the focus on speed, responsiveness, and customer access to information.
- A cacophony of marketing and SDR noise coming from various digital platforms – LinkedIn, email, Twitter, etc.
- Consistent sales practices that lead reps to asking the same questions and bringing the same 'insights' to every customer.
- Increasing frustration across buyers, who increasingly experience a sea of 'sameness' across vendors and capabilities.
- Consensus buying trends that continue make organizational decision making increasingly difficult (fueling to the growth of 'status-quo losses').

SX + CX = Customer Value

In the modern selling environment, winning teams focus on differentiating their sales experience, or SX. But what do we mean by 'sales experience'? The sales experience is a subset of the overall customer experience (CX). It includes two things – the customer acquisition experience and the customer expansion experience.

The first part is the interaction between a buyer and various customer-facing teams of a seller. It's what leads to the initial contracting. The second part is the experience the customer has with customer-facing resources who support product or service expansion.

We've excluded service delivery and support from our definition. These motions are certainly important, and there's a mountain of research on this part of the journey (read any NPS research or voice of customer study out there). This definitional focus also excludes the digital touchpoints that exist prior to an initial customer interaction. Our view of SX centers on what's missing for most companies and customers and the interactions typically owned by sales. Too many sales teams have a poor understanding of what a winning SX should be for their solutions.

The elements of the sales experience include all the touchpoints that occur in the customer's deciding journey, including things like:

- The outbound email sent by the SDR
- The LinkedIn connection request
- The first discovery call
- Subsequent discovery and solutioning meetings
- The pitch and business case
- The final proposal and negotiations
- The quarterly business reviews
- The renewal email or meeting
- The cross-sell or upsell conversations

And so much more...

These interactions can take the form of conference calls, in-person meetings, online demos, trials, workshops, etc. And they can involve a variety of resources both from the sales organization and the customer.

The New Buying Experience

Do these touchpoints sound familiar?

Of course, they do! They've been a part of nearly every sales process since the beginning of time. So, what's different about a buyer-focused 'experience'? How are these interactions more than just steps in a sales process?

An effective sales experience is more robust. It brings together many concepts often considered in isolation of selling skills. This includes things like messaging, visuals, content, and meeting formats. It also aligns the activities of multiple sales roles, all in an orchestrated way. The uniting factor is the goal of providing meaningful value to the buyer. Providing this value means rethinking nearly every components of the sales motion.

FROM		TO
Interrogation-based questioning	→	Mutually beneficial, guided discovery
Selling and service delivery focus	→	Facilitator and advisor mindset
Presentation about capabilities	→	Engagement in insights
Deep dive on technical issues	→	Elevate focus to business issues
Pitching the solution	→	Co-creating the solution

Differentiating in Discovery

The discovery meeting is an example of a critical moment within the sales experience. It is the first significant touchpoint between salespeople and buyers. In a common scenario, you and four of your competitors are pursuing the same deal. You've all been granted one hour with the buyers.

Here's what they probably see from their side:

- The products look alike.
- Everyone is focused on the same outcomes, using the same words.
- The promotional materials are equally slick.
- They all have great logos to brag about.
- The sales reps are equally liked.
- The pricing is generally the same.

Since the late 1970's, sales leaders have obsessed over getting discovery questions right. (Surely there's some magical question that lets reps take control over the sale, right?). Fast forward 40 years, and not much has changed. But the traditional question-based approach has major risks in today's consensus selling environment. Poor discovery results in buyers tuning out. Or, worse, reps interrogate buyers, holding them hostage as they march through a barrage of questions. This approach makes the discovery experience all about the seller, with minimal to no value delivered to buyers.

Buyers tell us that they spend five or more hours answering the same sets of questions, hearing the same types of stories, and seeing essentially the same demo. Ultimately, the winning team becomes the one who executed the same motions as everyone else, but marginally better. Over time, this cycle repeats. Reps continue to be brought in late since they're failing to add value early in the process.

The good news is that buyers are willing to invest time and energy in discovery activities. Yes, buyers are inundated with information about purchase decisions and options. And yes, they're connecting with sellers later in their deciding journey. But they're still willing to make room in their schedule. In fact, buyers tell us that they're hungry for better rep engagement during this stage. The pressure is on for the salesperson to get discovery right.

How can any seller differentiate in that one hour?
Do they ask better questions than the competition?
Do they deliver different or better insights?

Customer Co-Creation: The New Model of Discovery

To execute a differentiated SX during discovery, reps must move from a rep-centered perspective to a buyer-focused perspective. This change means evolving to a completely different discovery model grounded in the concept of customer co-creation.

To make this happen, reps can longer take buyer requirements ‘as-is’ or look to just ‘fill the order’. They also can’t frame the questioning too low, just focusing on preparing for a demo or proposal. This new model of discovery requires reworking historical discovery training and tactics. Reps must serve as a consultant, helping to better frame the issues, solution and path forward. Working as advisors, agnostic to the solution, modern reps are focused on helping customer navigate their own decision-making. But to make this a new reality, sellers need a new discovery toolkit.

This new discovery toolkit requires a level of business acumen and adaptability not found in traditional rep profiles. We hear many CSOs say that pre-sales or solution consultants are brought into deals too early. Sales leaders see this as an inefficient use of those scarce and expensive roles. This also raises questions about the skill gaps of traditional account execs. Too many AEs can’t lead more strategic prospect conversations around customer business issues. They’re not armed with the problem- and solution-finding frameworks and capabilities that today’s buyers demand.

Why a Differentiated Discovery Experience Matters

Getting the discovery experience right is critical to the rest of a differentiated SX.

- Issues and solution are framed broadly
- Explicit connection is made to the larger business situations
- Critical for maximizing the full value of your solution

What to avoid:

- Selling point-solutions when a broader solution could have been positioned
- Sending vague proposals lacking knowledge of the customer’s business drivers or disconnected to a compelling customer event or need
- Surprises arising from new information coming to light late in the deal, when it becomes too late to course-correct or influence
- Avoiding losses because deals get stuck, age out, or simply vaporize (from being poorly qualified from the start)

An effective SX includes three major strategies to create customer value starting in the discovery process:

Anchor to the Big Idea

Build the Business Case for your Champion

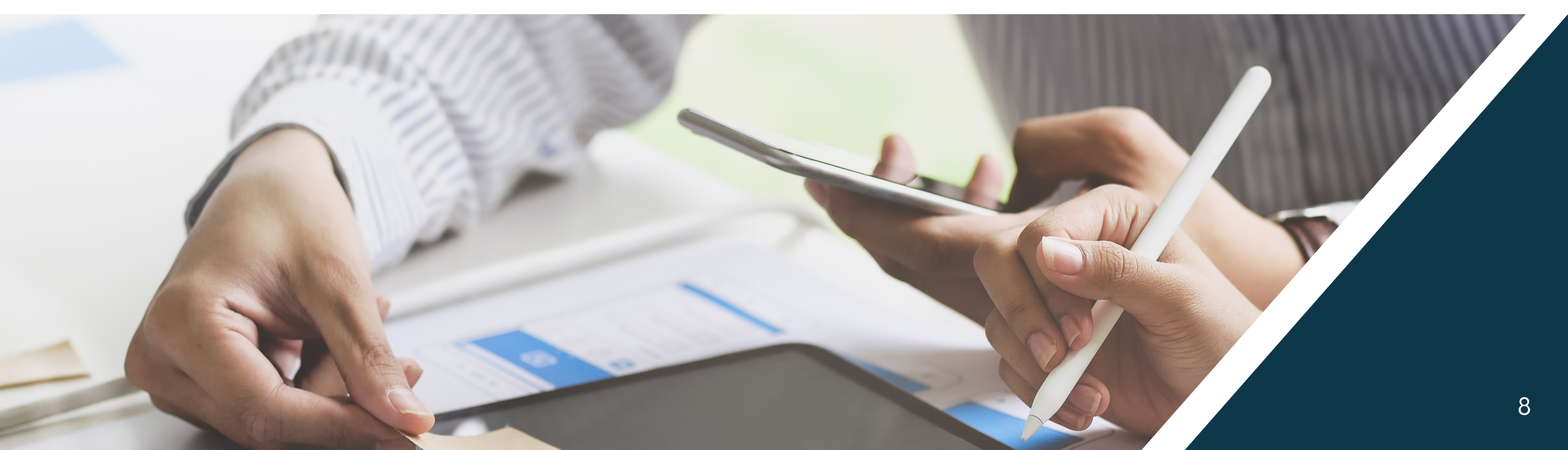
Sell the "Engagement" first

Too many reps fail to communicate a vision or the Big Idea that aligns their solution to their buyer's pain points. Solutions are complex. They come in lots of shapes and sizes. You can add features and services to create an infinite range of possibilities. However, too many reps fail to articulate a vision of what their solution can do for a company. The Big Idea vision is based in the customer's business issues – and in their language. It helps buyers better understand where they need to go to improve performance. It's not based on product features or attributes. Without a Big Idea vision, sellers end up in technical feature or price 'bake-offs'.

At the end of discovery, reps should have the narrative they will use to sell to Executives. This selling story is typically focused on overall enterprise ROI and the broader business benefits. But reps aren't usually in the position to deliver this message solo. Business case content is needed for the Champion as the rep's partner in the sales process. Champions can be powerful channels to deliver your message to other internal influencers. Ideally, this business case narrative will position Champions more strategically to their bosses and peers. Every rep should be able to build an initial outline of this from early discovery activities.

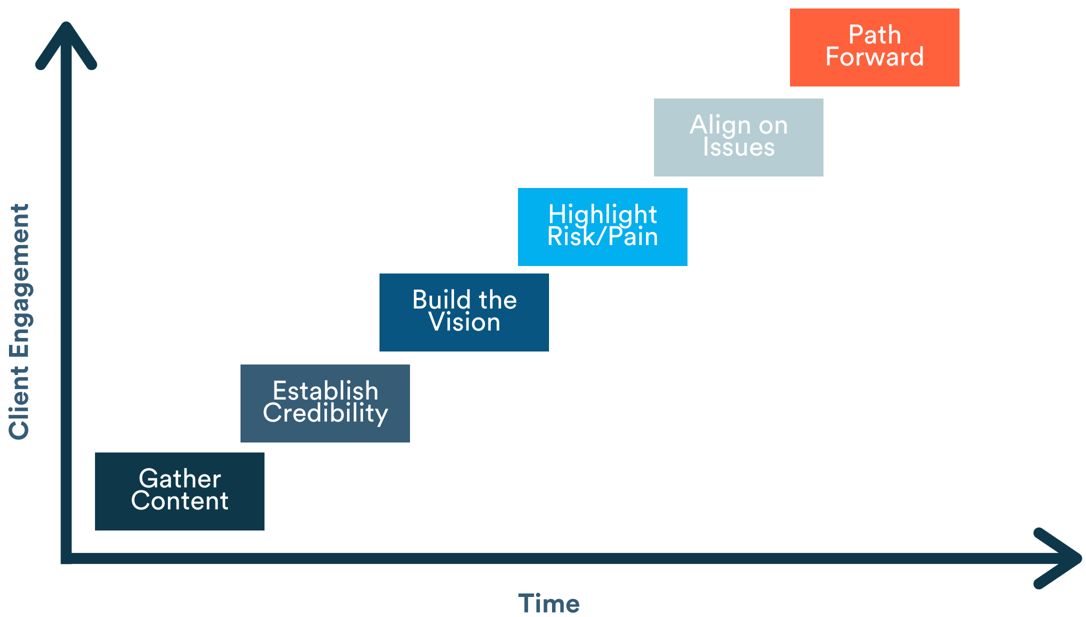
The discovery process should include a 'pitch'. But the pitch isn't or the solution. It's the 'pitch' for working together to find the solution. Gaining mutual commitment to investing time and brainpower in effective discovery is key. And this is important even if the rep is coming in late to an opportunity. A buyer's response to this engagement pitch is a powerful qualifier. It's a way for reps to assess their ability to influence the buyer's view of the problem and solution. If the customer doesn't bite, then you know you need a different sales play. If they do, great! Now you've got the opportunity to co-create the solution with them.

Bringing these three strategies to life in the discovery process leads to bigger opportunities and increased win rates. But this approach can be complex to design and execute. In particular, alignment and support from sales, enablement, and marketing is needed. Targeted training is also required to build the situational awareness that reps need to execute experience-focused discovery.



The Choreography of Differentiated Discovery

One powerful form of differentiated discovery experience is a well-choreographed workshop. In a discovery workshop approach, the rep guides prospects in a collaborative conversation to unpack issues and opportunities. Reps must provide so-called insight, but the goal is to engage clients in a different kind of dialog. The workshop experience will typically include a pre-meeting, the actual workshop itself, and post-workshop activities. The level of customer engagement increases as this process unfolds. Below are the core components of a discovery workshop experience.



Enablement Requirement or a Differentiated Discovery Experience:

- Equip your teams with a big Idea framework and vision roadmap. These are guides used to help customers reflect on their current situation. Effectively used in early discovery conversations, they are a structured way to chart the path forward. Reps must establish a vision for the future before they attach solutions, not the other way around.

- Provide your teams with templated ‘Champion’ content that can be tailored after a discovery meeting. Templates should focus on the business issues, priorities, and the case for change (not just promotional content about your solution’s features).

- Build an ‘engagement’ process that details how reps will work with the customer to co-create a solution. Include key activities, time, and resources as well as expected commitments from their side.

1. Gather context. This is simply gathering background information on the customer, their business situation, and their market. Context gather typically occurs offline using any number of resources available to most sales teams. But it will also include a pre-workshop call to set expectations and round out the seller's baseline understanding of the situation.

2. Establish credibility. Credibility building doesn't have to be delivering exhaustively long "insight" messages. But it should include a point-of-view around the larger business situation. The goal is to start the conversation at a high level and anchor the discussion in a broader business frame. Reps credibility when they first propose the discovery workshop – they are positioning themselves as advisors, communicating the need to engage on this issue differently (beyond a simple set of questions and/or a demo). The discovery workshop then kicks off with a summary of the seller's POV.

3. Build the vision. The next major component of a discovery workshop is collaborating with the customer to define the to-be state. It is critical that this vision is grounded in the customer business issues and priorities. Especially in complex, large-ticket solutions, sellers must frame their solution in terms of business value or benefits. A whiteboard or 'placemat' framework is used to guide this vision discussion so that it is interactive and facilitated.

4. Highlight the risks or pain points. Once the vision is defined, buyer and seller then collaborate on an assessment of the current state. The focus here is on building a shared understanding of the current risks or pain. This becomes especially clear in contrast to the vision – what is the present situation relative to the vision?

5. Align on the issues. Not every issue is worth addressing. Buyers will view the seller's solution in the context of their other problems and issues. At this stage, the seller facilitates a conversation around priorities. What are the items to address first? Sequencing can be especially important in some markets because tackling one area first may build internal support or free up funds to fund a phase two. The trap here is moving too fast through this process. The seller must confirm that all influencers are fully aligned around the issues and their prioritization.

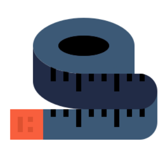
6. Path forward. The final step in the workshop structure is a practical discussion around next steps. This typically includes discussion of others to bring into the conversation. Nearly all complex buying decisions will require the involvement of multiple influencers. Common next steps will be gaining commitment to a follow-up meeting with these additional players. The key is gaining mutual commitment to specific, tangible actions that move the process forward.

Customer Benefits of a Discovery Workshop

Holistic

Provides foundation so the issues and solution are considered in the context of the customer's broader business situation

Tailored



One-size does not fit all... this approach is tailored to meet your customer's needs and timelines

Issue-Focused

Elevates the conversation and prioritizes the customer's business issues over your products or services

From Idea to Execution

No one will tell you that the sales experience doesn't matter. But in the mad dash to 'hit the number', the how is often overlooked. Too many organizations lack the mindset, skillset, and toolset to drive differentiation, and ultimately differentiated customer value. The best sales leaders and sales organizations are investing in what it takes to deliver great SX. And they're reaping the rewards, even in highly competitive markets.Some of the biggest changes needed to deliver a differentiated SX involves the individual rep's mindset and skillset. Like a wise professor or seasoned management consultant, the most effective sellers see themselves as facilitators. Once the rep views himself as a facilitator, he can truly engage in a dialogue that is valuable for both parties.Bringing this facilitator's mindset to life requires new skills. Think back to a memorable training or learning experience. Consider how the facilitator navigated the group down a path to reach a desired outcome.

Effective facilitators do four things well:

1.

Test for comprehension and agreement. The best facilitators have a learning objective for their session. Everything they do – from the slides to the activities to the questions – is designed to help learners gain a new understanding of a concept. In the same way, sellers need a learning objective for differentiated sales experiences. For instance, by the end of discovery workshop, reps need to ensure that the participants have a common understanding of the problem and the path forward.

2.

Know when to speed up or slow down. Facilitators are the conductors of the sales experience, pacing and sequencing the content and dialog. They have a plan to hit their objective, but instinctively make adjustments on the fly.Sellers also need to know what to cover and what to emphasize. But they also need to be nimble. For instance, no discovery workshop goes completely as planned. Reps need to assess how participants are tracking in the workshop. When folks are fuzzy about the issues, the seller changes the pacing and messaging to get everyone on the same page.

3.

Bring everyone into the dialogue.Every training session likely includes at least one disengaged participant. These are the people who sit in the back of the room, arms folded, dreading the next few hours. Great facilitators know how to engage these people, break down their barriers, and open them up in the discussion. They also know how to manage the group so it's not dominated by just one or two participants.A differentiated SX meeting will likely have some of these similar characters. The quiet folks can end up being skeptics or deal blockers. And the most talkative people may not have a full picture of the situation. Sellers need to find a way to manage the group dynamic throughout the deciding journey.

4.

Guide the participants in reaching their own conclusion. Effective learning happens when the participant follows a process to gain an understanding on their own. Talented facilitators use interactive exercises and discussion to guide, not dictate, the learning experience. This means minimizing the "telling" aspect of training (marching through a slide after slide of PowerPoint) and emphasizing experiential tactics and self-reflection. Likewise, to deliver a differentiated SX, great sellers resist the temptation of simply "telling" prospects the answer. They let the group discuss the issues and guide the process so customers feel like they are reaching their own conclusion. This is especially true in a discovery workshop. Discovery should refer to what the customer is discovering in that meeting, not what the seller is learning.

In addition to facilitation skills, reps need strong business knowledge – specifically financial and operational acumen – to deliver the differentiated SX. More than ever, reps must demonstrate broader business skills through the conversations that go well beyond product features and benefits.

The hard truth is, too many reps can't have business issue discussions. Most have only been trained to deliver product pitches or manage a linear buying process using a one-size-fits-all sales process. They might have mastered the story of their solution, but they can't facilitate business conversations.

Improving the business acumen of sales teams should be a priority for sales and sales enablement leaders. To make a differentiated SX real, sales teams need the acumen, terminology, and confidence to connect their solution to their customer's business. This means specific training and enablement in the areas of accounting, finance, leadership, strategy, operations, marketing, and change management.

Differentiated SX in Action

We partnered with a SaaS company to reimagine their discovery experience using the workshop-based process. This approach shifted the focus of reps from delivering demos too early and only competing on features and price. This new strategy involved rep advanced skill training and a new meeting toolkit and messaging. After adopting this approach, the company has seen remarkable results, despite operating in a highly competitive environment.

- 10-point increase in win rates
- 37% increase in average contract value
- $250K increase in average rep productivity, enabling a 13% reduction in team size

> Most vendors seem to do a discovery with us, and then forget everything and just deliver the same old s*** in their standard demo. This company actually listened. They pushed my thinking… maybe a little hard, but good. I wasn't thinking about this right, I now know. I gotta say, I'm really impressed here… This felt different.
>
> - COO, $6 Billion Manufacturer Customer

Taking the Next Steps

The goal of a great sales experience is differentiation. This differentiation is what leads to better close rates, more favorable pricing, and faster deal velocity. We believe SX is the next frontier for B2B sales.

The good news is that sales isn't starting from scratch. We can learn a lot from our B2C brethren: Amazon for their ease and speed. Apple for their innovation. Nordstrom for their service. Marriott for their consistency. These brands have established a differentiated experience, which has helped them sustain success.

The potential of delivering a differentiated SX is significant, in complex selling models as well as markets that have been historically more transactional in nature.

Contact us to explore this topic in more detail. We'd love to share our latest research and best practices from those companies who are delivering the new SX.

Who We Are

- We are a sales enablement strategy firm founded in 2012 as a spin-off of Mercer's Sales Performance Practice
- Brevet provides customized sales performance solutions, leveraging our unique capabilities in management consulting, training and technology
- We are a boutique firm with two primary hubs in Atlanta and Seattle and team members located across the country
- We work with sales teams from early stage to large enterprise clients across verticals, with specialized focus areas in Software, Healthcare, Industrials

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