



WHITEPAPER

Why Most Sales Teams Have No Idea What The Buying Criteria Are

And How They Can Crack the Code



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Whenever I start working with a new client, I see a few recurring, predictable reasons the team's sales process doesn't work as efficiently as it could. Perhaps the most common of these problems is the selling side's lack of clarity about the buying side's real-world criteria for approving the purchase decision. It's sad but true: Most sales teams have no idea what a given B-to-B opportunity's real-world buying criteria are.

In this paper, I'll look at three complementary, ongoing strategies that sales professionals (that is, leaders and front-line contributors), can pursue to address this common challenge. My experience is that teams generally do best when they adopt these strategies both sequentially and concurrently: deploying the first strategy on its own, then deploying the first in combination with the second, and finally deploying all three strategies over time, on an ongoing basis. The three strategies for supporting a team, and a sales process, that consistently "cracks the code" of the buying organization's decision process puzzle are as follows:



Understand the (reversible) dynamic that makes incomplete or incorrect assessments of the buying side's decision process happen in the first place.



Collaborate to define the critical situations where discussions with buyers and influencers about their internal decision-making process are most likely to go off track for us ... and then create and role-play pragmatic talk-tracks for communicating in real time in ways that uncover and address each of these scenarios.



Design a comprehensive, team-specific Decision Discovery MapSM (DDM). (We can help with this.) Continue to role-play extensively, using the DDM as a resource to point the team toward deeper and deeper mastery of the critical skill of **decision qualification** within their marketplace.

Step 1 Understand

Why are incomplete/incorrect assessments of the buying side's decision process so common?

Because the period following the onset of the global COVID-19 pandemic gave rise to structural changes to the business environment in which all B-to-B sellers operate.

The changes I'm talking about had a profound impact on the way sellers and buyers communicated with each other. Probably the most important aspect of the changed landscape was a **dramatic rise in the influence of the remote buying committee**. Many professional sellers still have not adjusted to this change.

To grasp why this transition has been so difficult, we may want to pause for a moment to examine our own backstory and the backstory of the organizations we serve. Before the global COVID lockdown, it was common for the ultimate responsibility for a major purchase decision to be assigned to a single individual deputized by the buying organization to act on its behalf. Back in the day, we called that person the **decision maker**.

A decision maker typically had both **clear budget authority** and **sizeable, but not unlimited, political clout** within a certain pre-defined area of expertise. In order to sustain both the budget authority and the political support, this person might seek input and secure consensus approval from a relatively small circle of colleagues, known as **influencers**, before finalizing any major purchase commitment.



Important discussions prior to the purchase often incorporated one or more **sales presentations** delivered by members of one or more selling teams, typically in person, to the decision maker and his or her influencers -- though of course some influencers preferred to operate behind the scenes. That word "presentation," as it was broadly understood by most buyers and sellers prior to 2020, is worth unpacking before we go further.

A presentation, not too long ago, was a face-to-face, in-person meeting, one that involved one or more salespeople delivering some kind of formal recommendation to a decision maker and, we hoped, to all those who were likely to impact the final decision. That's who we were told to present to: the decision maker and those who could and would influence the decision. And for a lot of us, **that's what theory told us to set up before we even agreed to deliver a presentation: a scheduled in-person meeting with the principals on the buying side**, all of whom would agree to hear what we had to say and then make a decision.

That was our standard. That was the ideal.

As sales professionals, we thus had a reliable, viable, model within which to work – that is, once we had, in Sandler terms, qualified for pain (that is, identified the problem or problems to be solved) and qualified for budget (that is, clarified the available funding). **Once those two steps were complete, we knew what our job was: clarify the decision-making process.** Find out who was influencing, who was deciding, and what the timeline for decision was. Then our job was to gather the decision maker and his or her key people in a room, walk into that room, look everyone in the eye, and make our best case via an in-person presentation, so we could get a clear up-or-down decision.



Generations of salespeople got used to following that B-to-B selling model. We were comfortable with it. And why not? Often enough, it worked. Even large groups formally designated as *buying committees* within enterprise other large accounts usually followed the lead of a single dominant, experienced person within the group – and we viewed that person (not always accurately, though) as being analogous to the decision maker in a less “complex” sale.

This was the paradigm. The model I’m describing here was, for perhaps a century, how the game of B-to-B sales was played. Salespeople accepted it and understood it as the norm because it was the norm. It is, however, no longer the norm. That’s because, in virtually all industries, the global lockdown phase that began in 2020 led, with breathtaking speed, to **deeper and deeper reliance on videoconferencing**. This game-changing communications shift transformed our understanding of what a “business meeting” could be. We see now that one far-reaching communications shift radically impacted business decision-making at all levels—not just purchase decisions. Today, videoconferencing drives virtually all strategically important decisions within large organizations.

It’s easy now to forget that, prior to the pandemic, videoconferencing tools had been reserved for exceptional situations, largely because of (outdated) assumptions about their expense and difficulty to navigate. Suddenly, though, in 2020, just about everything seemed to be an exceptional situation. That meant **video conferencing rocketed upward in influence, quickly becoming standard operating procedure for senior executives, those who reported to them, and, indeed, many others in the organization.**



This meant that in **2020 there was a global transformation**, almost overnight, about what constituted a “meeting.” In prior years, being on the other side of town, the other side of the country, other side of the world, meant you were, by default, out of the loop on at least some important discussions, because it was not practical for you to find ways to attend all the important meetings that might affect you and your department.

You no longer live in that time. **Anyone can now be in any meeting, at virtually any time, if it makes organizational sense for them to be in that meeting.** Video conferencing has made it far easier to schedule and conduct conversations with multiple off-site colleagues who may have something (anything!) to contribute to a given decision. The uptake of this technology has also made it easier for senior executives who may be difficult or impossible for salespeople to reach (such as CEOs and CFOs) to take part in the final phases of any corporate decision process that could benefit from their participation.

In business environments where cost savings and efficiency are increasingly matters of corporate survival, **C-level figures are now more likely to enter purchase discussions than they were a few years ago.** Many of them are disinclined to see expenditures as investments, and most are not eager to interact with members of any outside sales team.

The challenge is, a lot of sales professionals aren’t prepared -- logistically, psychologically, or organizationally -- to set aside the single-decision-maker-model. It’s what they grew up with. It’s what they’re used to. In many cases, it’s what their superiors are still telling them to do.

Theory is telling us that, in order to qualify an opportunity, we need to be in direct, real-time discussions with a single, all-powerful decision maker and a comparatively small group of influencers. **Reality** is telling us that, while that scenario is ideal (and wonderful where we can make it happen), we need better backup plans for the times we are looking at a very different picture.



Key Takeaways:

- Geography and physical location are far less relevant than they once were to evaluating major purchases – and as a result, **decision-making processes have, post-2020, become less hierarchical and more collaborative.**
- B-to-B purchase decisions are now likelier to involve **more people, take longer, be more narrowly focused on pricing issues, and require sign-off from many more individuals** than they did in early 2020.
- They are also likelier to incorporate **players who are difficult for salespeople to connect with** directly.
- As a result, we can expect **multiple centers of authority, complex and even conflicting assessments of a situation**, and an emphasis on **consensus-building and people skills.**
- **Persuading a single individual is no longer a sound strategic objective.** We are now talking about a **model closer to that of the jury**: a team gathered, sometimes with little advance warning, that must reach a verdict on an important case. Some of the people on that jury may be deeply engaged in the process; others may wish they were somewhere else. This means that **any presentation we give is far likelier to serve as the beginning of a conversation about purchasing priorities than as the end of one.**
- While the objective of delivering a presentation and receiving a real-time decision based on that presentation is still an ideal goal to shoot for, **the single-decision-maker model is, in most cases, no longer relevant.**

So – how do we adjust to this?





Step 2 Collaborate

How do we define, not just the reality of the buyer's decision process, but the places where our deal is most likely to go off track? And how do we become active players in the internal deliberations of the buying side?

Collaboration is the key to mapping complex decision-making structures.

Decision-making structures at many prospect and customer organizations have become **increasingly complex**. More influencers are involved, and individual department heads face greater scrutiny when it comes to getting approvals. For example, where once a director might have had full authority to make a decision, today, that same director might now need approval from a CFO or CEO who has only a cursory knowledge of the deal.

This change doesn't seem likely to reverse in the near future. Sales professionals are often taught to "get to power"—to reach the ultimate decision maker, often a C-level executive. While this remains an important goal, the reality is that, in many cases, sellers will never get access to the CEO or CFO directly. These executives are **increasingly focused on numbers** and are unlikely to meet with sales teams unless it's absolutely necessary.

Here's the good news: **your competitors are facing the same challenges**. The CEO or CFO isn't meeting with them either. And this shared challenge doesn't mean you're stuck or without options. Instead, it's time **to "thread the needle" by working with the key stakeholders you can access**—often the department heads or project leads who understand the problem and are your best allies within the organization. This is the first critical area of collaboration. It's a process that involves listening and judgment-free communication.

This is where your **coach** or **champion** comes in—the individual within the organization who is pointing you in the right direction and/or advocating for your solution. While they may not be the ultimate decision-maker, they can provide valuable insight into the decision-making process. They can help you understand the concerns of higher-level executives, provide feedback on pricing and value, and guide you through the organization's internal processes.

Here are some examples of the kinds of powerful questions you can ask your champion to gain better insight on the organization's decision-making process:

- "When you've brought other projects to the CFO, what concerns do they usually have?"
- "What do you think the CFO will like about our solution?"
- "What aspects of what you've seen so far are likely to raise objections?"



By leading these kinds of conversations in a self-aware, peer-to-peer fashion, you not only get a better understanding of the decision-making process, but you also equip your champion to better advocate for your solution. **Even if your champion is not fully aware of the internal decision-making process (and often, they aren't), you can guide them** by helping them think through possible obstacles and decision points. A big part of laying the groundwork for success here is making your coach or champion feel okay about not being certain about the process: about how other teams and team leaders in his or her organization will approach the problem under discussion – or whether they will even consider it a problem at all.

That's the first opportunity for collaboration. Let's look now at the second one, which is internal, rather than external. The second effective – and, I would argue, essential -- way to improve your understanding of complex decision-making processes is by **working with internal team members to conduct in-depth post-mortem analyses of the deals that didn't go your way.**

By closely examining the factors that led to an opportunity slipping away, you and your team can **identify patterns and obstacles** that might not have seemed obvious in the moment. Just as we did in our conversations with our coach or champion, we need to be ready to take part in these discussions in a non-judgmental, respectful, and open-minded way. Otherwise, we won't get an accurate image of the real-world factors that kept us from winning the business.

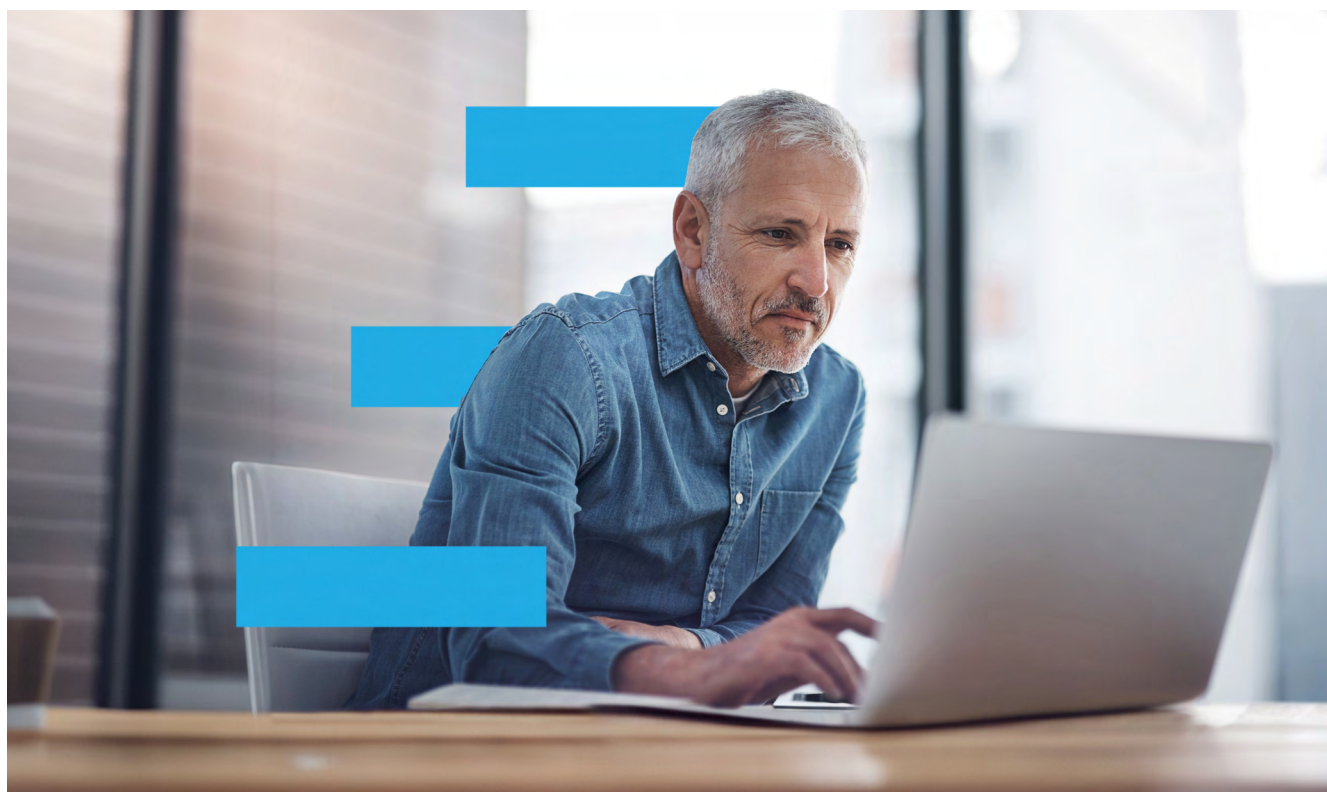
For instance, maybe we didn't engage a key stakeholder early enough in the process ... or perhaps a hidden stakeholder had concerns never got raised, and thus were never addressed. Whatever the case, **conducting a thorough review of lost deals helps our team identify the likely key players in the "jury room"** – as well as the questions we would want to be sure to ask in future deals, not just to track down missing pieces of data, but to build and sustain a viable coalition for change within the organization.

This kind of analysis (which takes time, and which we can help you conduct) can also shed light on broader organizational dynamics that might affect the buying process. For example, are there predictable **political divisions** within the organization that are likely to impact purchasing decisions? Are there **conflicting priorities** between certain departments when it comes to evaluating the solution we provide? The better we understand these factors, the more effectively we can position your solution as the best choice.

When the results of Step Two, COLLABORATE, have been properly completed and documented, we will have a long list of questions, as well as a list that describes the various roles played by those who are most likely to be taking part in the "jury room" that will pass judgment on a fateful decision: whether to invest in our solution. What do we do with that long list of questions and that summary of the cast of characters? We **create a map** ... but not just any map.

I'm talking about a special kind of map, a map designed to identify, not bodies of land and water, but information gaps. We want to tweak, refine, and perfect this map over time – and we want to use it to guide our organization toward the questions that will fill in the gaps and (just as important) support the **key relationships that will make a viable coalition for change possible**.

Only when we understand the likely internal priorities, and the various internal constituencies, can we position ourselves as **honest brokers in the organization's search for a solution that works for everyone**. If we don't understand the priorities and the constituencies, we can't expect to be part of the team that solves the problem. We will be on the outside looking in.





Key Takeaways:

- Decision-making in organizations is becoming more complex, involving more influencers and requiring higher-level approvals.
- Sales professionals should collaborate with department heads and project leads, who understand the problems and act as internal advocates.
- Engaging “coaches” or “champions” within organizations can provide critical insights and guide sales teams through decision processes.
- Internal team post-mortem analyses of lost deals help identify missed stakeholders, obstacles, and organizational dynamics.
- Creating detailed “maps” of decision-making structures and filling information gaps is essential to positioning solutions effectively.





Step 3 Design

What is our comprehensive, team-specific Decision Discovery MapSM?

The more comprehensive the playbook you design, the better your team's preparation will be; the better your team's preparation, the better your team's execution; the better the execution and the results.

The Decision Discovery Map (DDM) is a **playbook designed specifically for your team and your market**. It's a glove-fitting, highly customized visual flow chart that walks your team through the best questions to ask throughout all or a designated part of your sales process. This tool is thorough, detailed, and built on the principle that the more effective backup plans you and your team have when it comes to questions that help you uncover *and lead* the decision process, the better off you are all going to be.

In most cases, the DDM is a tool that encompasses **dozens, or even hundreds, of pathways** for a conversation that you are likely to be leading with a buyer/influencer. When complete, it's a large printout you can post in every team member's work area.

Here's a tiny snapshot of what an early-phase-discussion corner of the DDM might look like:





A customized Decision Discovery MapSM provides you and your team with a **significant competitive advantage**.

Because it's based on your own careful analysis of the factors that kept deals from going your way, the DDM covers **all the major decision factors** in your buyer's world. It serves as a detailed, real-world guide for your sales team as they navigate complex buying processes.

It helps them **identify the key decision-makers, anticipate potential objections, and craft targeted messages for each stakeholder**.

By using this tool to **role-play different scenarios** and **refine your team's communication strategies**, you can move closer to mastery in decision qualification and significantly increase your chances of closing deals.



Key Takeaways:

- The Decision Discovery Map (DDM) is a highly customized visual flowchart tailored to your team's sales process.
- It guides the team through critical questions to ask, improving decision-making and execution during sales conversations.
- The DDM covers dozens or hundreds of conversation pathways, providing backup plans to handle diverse buyer interactions.
- It helps identify key decision-makers, anticipate objections, and craft targeted messages for stakeholders.
- By using the DDM for role-playing and refining communication strategies, teams can significantly improve their sales effectiveness and close more deals.

Contact Us

For help in creating your team's custom Decision Discovery Map.



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Sandler is the worldwide leader in sales, management, and customer service training. We partner with organizations of all sizes, across all industries, to help them improve their revenue performance. Sandler not only provides the initial and advanced strategies and tactics needed to excel, but we also empower your team to develop the attitudes and implement the behavior necessary to reach the highest levels of success.

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