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## The Modern Sales Approach

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*The illiterate of the 21st century will not be those who cannot read and write, but those who cannot learn, unlearn, and relearn.*

—Alvin Toffler

PROFESSIONAL SELLING HAS evolved over the past 75 years or so and using the modern sales approach is the best way to show that you're One-Up. Despite this, two older approaches, legacy laggard and legacy solutions, are still practiced. One reason you may be One-Down is because you are using a legacy approach to selling, one that is ill-equipped to create better outcomes for your clients. Here, we'll look at why the legacy approaches can hold you back, and how the modern approach can help you become One-Up.

## **The Legacy Laggard**

Even the most recent strategies and tactics you find in the legacy laggard approach are now more than fifty years old, with some elements dating all the way back to the 1920s. They're built on the concept of information disparity, the idea that because your client was lacking information about your company's products or services, they needed to meet with a salesperson to learn what is available. As you will learn in Chapter 3, this disparity allowed salespeople to take advantage of the customers.

The fact that the prospect needed to buy something the buyer was selling made the interaction transactional, like many business-to-consumer purchases, but transactional models don't create the right level of value for B2B sales. Legacy laggard salespeople are trained to find "the decision-maker," the single person with the authority to decide to sign a contract and ensure payment, overcome their objections, and make the sale. That process started by answering "why us," with the salesperson attempting to prove credibility by talking about their company's strengths and history to persuade the prospective client to buy from them.

Because prospects in the 1950s and 1960s couldn't simply browse the company website, the salesperson also provided them with particulars of their company's products and services. The value of the conversation was limited to the products and services the sales organization provided, as they were central to making a sale. In fact, if you still start your sales conversation by talking about your company and your products, that strategy is pure legacy laggard. One of the main tenets of the legacy approach was to refuse to provide "free consulting," an idea that not only reduces your value but prevents you from being One-Up.

## Legacy Solutions

As the environment changed and companies demanded more from their *suppliers* or *partners*, labels that suggested a greater obligation than one might reasonably expect from a *vendor*, the new legacy solutions approach provided greater value to both the customer and the sales organization. The major shift in this period is best illustrated by the idea of discovery. Instead of the salesperson just sharing information about products and services, the first conversation morphed into a series of questions designed to find the prospect's *dissatisfaction*, their *pain point*, or their *hot button*. These conversations were—and are—still more valuable than the legacy laggard approaches. If your sales conversations focus on finding a problem that fits your company's solution, you're still using a legacy solution approach.

Salespeople who used a legacy solution approach still tried to answer "why us," but they added "why our solution" to the mix. As solutions grew more complex and became more critical to a company's business results, the decision-maker gave way to the buying committee or task force, the group of people charged with deciding what to buy and from whom. Not only would the salesperson have to overcome objections, but they'd also be required to provide proof that the solution would work for this particular client.

In a legacy solution approach, the solution is the value, and the salesperson provides value by solving the client's problem, getting us about halfway to an approach that is consultative.

Before we go any further, please don't worry if your approach is cobbled together from both legacy approaches. I used both models myself early in my career, and they were genuinely useful before rapid market changes caused me to adapt a more modern approach, focusing on creating enough value to win deals.

## **The Modern Approach**

The modern approach is consultative, requiring much more of the salesperson. Modern contacts, stakeholders, decision-makers, and decision-shapers need salespeople to create greater value (read: more help). No client finds value in a conversation that doesn't help them improve their decisions and their results.

The focus of the sales conversation is no longer "why us" or "why our solution." Instead, it's now about "why change" and "why now." Instead of relying on your company and your solutions for your credibility, trusting you can create value in the sales conversation, the modern approach requires arming yourself with insights and a certain perspective on what your client needs to do to improve their outcomes.

Because you already know what problems the companies you call on are experiencing, instead of helping the client to identify a need or a problem that needs solving, the modern approach starts by helping your contacts understand their world—one often marked by dissonance stemming from the constant, accelerating, disruptive change in their environment. By explaining the nature of their contacts' challenges, the One-Up salesperson helps them recognize the need to do something different and provides them with the ability to improve their results. It's important to note that none of these outcomes require you to mention your company, your products, your services, or your "solutions."

When your clients need significant change, that decision isn't going to come from a traditional decision-maker or a buying committee. The larger and more strategic the initiative, the more you are going to need something closer to organizational consensus. Instead of objections, you find your contacts with real concerns that speak to their uncertainty, which often paralyzes them and prevents them from moving forward. Being One-Up is required to resolve those concerns and create certainty around doing what is necessary to improve your client's position.

As the (One-Up) person best positioned to guide the (One-Down) client to the better results they need, you must lead them. We'll cover some leadership tactics later, but for now, know that your insights include which conversations your stakeholders need to have to make the best decision for their company. You can think of this as an *agile, facilitated, needs-based buyer's journey*. While the legacy approaches treated the sales conversation as linear, a straight line from Target to Closed/Won, the modern approach accepts that both sales conversations and decision-making are now nonlinear, requiring the agility enabled by being One-Up.

## True Confessions of a Legacy Salesperson

I started making cold calls for a nonprofit when I was fifteen years old. After two weeks, I found a much better job at a skating rink, so I quit. During that two-week period, I had scheduled two events—two more than all of my coworkers combined. There is no way that I was especially good at the work; my success was due to my work ethic and my ability to suffer without complaint.

Not too many years later, when I was forced into an outside sales role, I was taught and trained to present my company by walking the client through a huge binder that was designed to answer both classic legacy questions: “why us” and “why our solution.” I literally read the binder to the poor, suffering souls who

were too polite to throw me out of their office. One prospect was basically catatonic when I left her office. I really hope she had a good health plan.

When the \$4 billion company I worked for decided to train me, they taught me to ask my prospective clients for a single order, the old “get the camel’s nose under the tent” strategy. (It’s cold in the desert at night, and when you allow a camel to put his nose under the tent, you end up with a not-so-cuddly animal sleeping next to you.) In a role play, however, I tried to convince the regional vice president to give me all of her orders. After the exercise, I was taken into another room and told that I would no longer be allowed to participate in the training. The regional vice president was concerned that I was “scaring the salespeople who were afraid to ask for an order.” My manager laughed at the situation, as we had fun taking over entire accounts, preferring to acquire clients instead of orders. It would take me nine full years of sales before I was able to help my clients adjust more than the name of their supplier. Eventually, though, I found my way to One-Up, and I haven’t looked back.

Being One-Up is vital simply because there is no reason for a client to ever take advice from someone in the One-Down position, especially when it comes to making important decisions and pursuing better results. What value is a salesperson who knows less than the client they are trying to help? In Nancy Duarte’s excellent book *Resonate*, she suggests that your client is Luke Skywalker while you are Yoda. Your client is the hero, albeit one who is rather clueless, presently inadequate for their mission, and a bit of a fixer upper. You, however, have greater experience and the ability to provide the help your clients need.

Personally, I prefer Obi-Wan Kenobi to Yoda; maybe it’s the white beard. In either case, you have to provide insights that allow your client to succeed in their mission. The starting point for making a One-Up sale is demonstrating your expertise in the sales conversation with your prospective client, leading with

the insights your contacts need. You need not worry about sharing your insights or providing risky “free consulting,” as it’s far riskier to pursue a legacy approach. Besides, you are going to teach your client everything they know, but not everything you know.

## **How Your Client Knows You Are One-Down**

There are a number of obstacles to becoming One-Up. The first obstacle is an unawareness of the plan necessary to execute the strategies and tactics that make up this approach. Without a complete approach to the One-Up strategy, it is more difficult to execute. Your client will recognize your One-Downness by your approach. When you open a conversation by sharing information about your company, for example, you have already demonstrated that you have nothing more valuable to share. When what you share creates no value for your client’s future results, you are One-Down.

The desperate attempt to build rapport at the beginning of a conversation with your prospective client also broadcasts your One-Down desperation. The new rapport in sales is a business conversation. The more you need a deal, the more you present yourself as One-Down. If you are really desperate, you might be Two-Down, knowing even less than those who are One-Down. The nature of your conversations and your questions also provides evidence of your One-Downness. When you ask your client questions about the problems they are having, you prove you are an amateur. How could you not already know what kind of problems and challenges your client might be experiencing? And even beyond that, not starting with a theory about why, what, and how your prospect should change means you are One-Down.

Here is a simple test to determine if you are One-Down: Does the client benefit from the conversation more than you do?

There are other tells that prove you are in the One-Down position when compared to your contacts. The more you comply

with a process that is being driven by your contacts or their company, the more certain it is that you are One-Down. When your prospective client sends you an RFP and you respond, you have shown that you are subservient, servile, compliant, and worst of all, One-Down.

By the way, the One-Up approach to an RFP would start with a call to the person who sent it so you can explain that there is no way you can answer their questions and still show them how companies like yours help clients with better results. Then, to ensure they understand they are One-Down, you ask them a question they can't answer: "Is there a reason you are trying to do this the way we stopped doing it four years ago?" Before they can answer, add, "How do you want us to document our approach?" Congratulations, you are now One-Up. Your contact is now concerned about what they don't know, and they now know someone who understands what they are missing. Worst-case scenario, you get invited to present.

## **Mistakes to Avoid**

There are a few common mistakes when flexing your One-Upness, and we might as well get the biggest one out of the way before we move forward. The worst possible thing you can do when using the One-Up strategy is to come off as arrogant. You want to avoid being a know-it-all and instead be seen as someone who knows a lot in this specific area. You don't want your client to think that you believe you are somehow superior to them as a human being. The human beings you call on don't ever need to feel as if they are One-Down outside of the decision you are helping them make. If you are an Alpha, any hint of arrogance is going to be treated as a challenge by another Alpha. It is also going to be recognized by non-Alphas as desperation to be important. The best way to execute this strategy is to recognize that you are One-Up in the areas where you have more knowledge and

experience than your client, while they are One-Up in a dozen or more areas where you are One-Down. It's humbling, I know.

Treat everyone as if they are smart but lacking some information that you can offer them to improve their decision-making and better future outcomes. One of the ways to soften your approach is to ask for permission to share ideas with your clients, ensuring that you don't poke the ego of someone who is used to being in a dominant position. You might also ask your contact to share their perspective with you, something that acknowledges their authority. Remember, you are equals.

The greatest risk to your success with this approach is to believe that you can learn nothing from your client to understand how best to serve them—and your future clients. A large factor that makes you One-Up is how much you have learned from your clients. Those who wish to teach should start by committing to learn. You must recognize when you need to be One-Up, as well as when you are—and need to be—One-Down. You better occupy the space of One-Up by descending to the One-Down position when someone else is One-Up and can help you see something that was unavailable to you. You are going to need to become an expert to maintain the One-Up position where you know more than your clients. Your client is in the One-Up position when they are sharing with you how things work in their company. In this case, your One-Down position allows you to take in new information that will be critically important to you later, when you find yourself One-Up again.

## **The Virtuous Circle of Increasing One-Upness**

You are an expert in what you sell, and if you are not, I hope you are on your way to becoming one; it will change your results and your life. Your client is an expert in their industry and their role, meaning they are One-Up in those areas. By providing your client with the insights and information they are lacking as it pertains

to the better results they need, you help them become One-Up—not over you, but over others who know less. The same is true for you. When your client helps you understand their business, their industry, their overall strategy, and a dozen other topics that close the gaps in your knowledge and experience, you are less One-Down and more One-Up, even if you lack the expertise of someone who spent their life in their industry. You know more than you did, and it's likely you know more than someone who isn't trying not to be perpetually One-Down.

There is no reason that you should worry about teaching your client what they need to know to be One-Up. They are not likely to surpass your One-Upness because they will not be able to acquire your experience selling what you sell. Your experience is deeper and wider than your clients who make a given buying decision once every few years at most. You help clients and prospects make those decisions every day. If you sell in different verticals, you know things that other people don't because you spend time learning from your contacts, but you recognize that you lack the expertise of your clients in their industry.

### *How Being One-Down Makes You One-Up*

One of the ways you improve your ability to be One-Up is by being One-Down when you need to be. In one of my first jobs as a field salesperson, I called on large distribution centers in my territory of Columbus, Ohio. It was a target-rich environment, and I had homed in on a number of very large prospects, each one spending millions of dollars with companies in my industry. Having won one of the largest retail distribution centers in the city, I was learning how best to take care of their needs. My main client was a seasoned veteran of the business, and he invited me to sit in on his planning meeting, an indication that he favored me over my competitors.

The conversation I was listening to was in a language I didn't speak. First, the managers and leaders used a lot of acronyms that

made no sense to my ears. Second, they used a lot of jargon. While I didn't yet have the concept of being One-Down, I felt it. I was lost. When I left the meeting, I asked my main contact to help me make sense of what I heard, especially the term *throughput*. It's not difficult to guess the meaning of the word, but for this group, it was a math equation. He patiently explained to me that the throughput was a calculation based on how much product they shipped divided by the cost of their labor. They had goals around throughput. He showed me how they kept score on a spreadsheet. A few weeks later, I walked into a different prospective client's distribution center and asked my main contact what their throughput numbers were like during their peak season. He was stunned by the question, as no one else in my role would have known to ask. There is no way I was One-Up when it came to running a distribution center, but I was One-Up on any and all of my competitors. Without knowing that I was being taught to be One-Up, I was gaining a competitive advantage by asking my client to educate me about their business, correcting my One-Downness.

### *Learning From Your One-Up Client*

There are many things you need to know to successfully help your client change and produce the outcomes they need to be successful. But at least in these three areas, you need your client to help you understand what you need to know and how to use that knowledge to help them succeed.

**Their Industry** Unless you have worked in your prospective client's industry, your client is certain to know more about their industry than you. What you want to be is an expert on the line where your industry and your client's industry come together. You are already an expert in your industry, and you understand what's on your side of that line. Because your client is an expert

in their industry, they have the knowledge and experience to be able to help you understand their side. Every interaction with a stakeholder provides you with an opportunity to be tutored by experts in a specific industry. When your contacts tell you how their business works, how challenges show up in their world, and what the optimal change might look like for them, you have gained information that allows you to be better prepared for future conversations with other clients or prospects. In a conversation with a new prospect, you are starting out less One-Down than you might have been had you not learned from your previous clients.

What's even better is discovering that some companies have beliefs and ideas that conflict with other companies in the same industry. When you are aware that some approach works in some scenarios and fails under different circumstances, you have situational knowledge to understand what works, when it works, and what conditions need to be present for something to be true. Every industry has a number of things that differentiate it from other industries. Your client can teach you how they think about their business and their industry, providing you with the context needed to understand why they do certain things in a certain way. Industries also tend to have a set of concepts and a vocabulary that is all their own. You want your client to teach you how to think about their business and how to speak their language. You want to sound and feel like an insider, someone who is "one of us." Every interaction with a contact inside your prospective client's account is an opportunity to learn something that will benefit you now and in the future.

**What Your Contacts Believe** Your contacts are operating based on certain assumptions, some of which are false. Those false assumptions may not have started out incorrect, but they have outlived their value as the world changed. It's much easier to help people adjust their no-longer-accurate assumptions

when you understand what assumptions they have now. We are laying down two sets of tracks here: the beliefs that prevent your client from producing the results they need, as well as the things they believe that are true. Both tracks are valuable to you in helping them improve their results.

The reason stakeholders don't love your slide deck presentation when you propose an initiative or project is that they prefer to grill you with not-so-hypothetical hypotheticals to ensure what you propose will work for them. In previous conversations, you might not have captured all of these questions and the responses to the questions you ask to gain greater clarity—organizing your knowledge, increasing your knowledge and experience, moving ever closer to being an expert. Now you know better.

**Navigating Their Company** There is one area where you are no match for your contact when it comes to being One-Up: how things work in their company. Unless your contact is new to their company or their role, they know how things get done inside their world. There is a lot of tribal knowledge inside any group of people that spend most of their waking hours together. Your contacts are going to know where all the landmines are buried. Your lack of knowledge about how to traverse this ground makes you One-Down and open to the types of mistakes that can cause you problems as you help your client pursue the results they need. You don't know that any criticism about Jimmy's sacred cow is going to lose his support. Unless you are able to pick it up in meetings, you have no idea that Jenny has had all she can take from Jimmy being so averse to the change she believes is necessary. The people who have a map to this terrain are your contacts, many of whom lack formal authority but have tremendous insight about their peers and how best to pursue change inside their company. Later, your map is going to be helpful to you and your contacts, putting you in the One-Up position because you will know more than your client.

One way to remain forever in the One-Down position is to ignore all of the things you see and hear when you are meeting with your clients. You can work toward being One-Up by learning from your clients. I promise you that by the end of this book, you will be One-Up, and you will value every client conversation in a new way.

