



Pitch.Link Presents

# CONVERSION OPTIMIZATION GUIDE

(Volume 1 of 6)

## FIXING THE 5% CONVERSION PROBLEM IN B2B SALES

LEARN FROM 28 INTERNATIONAL  
SALES EXPERTS

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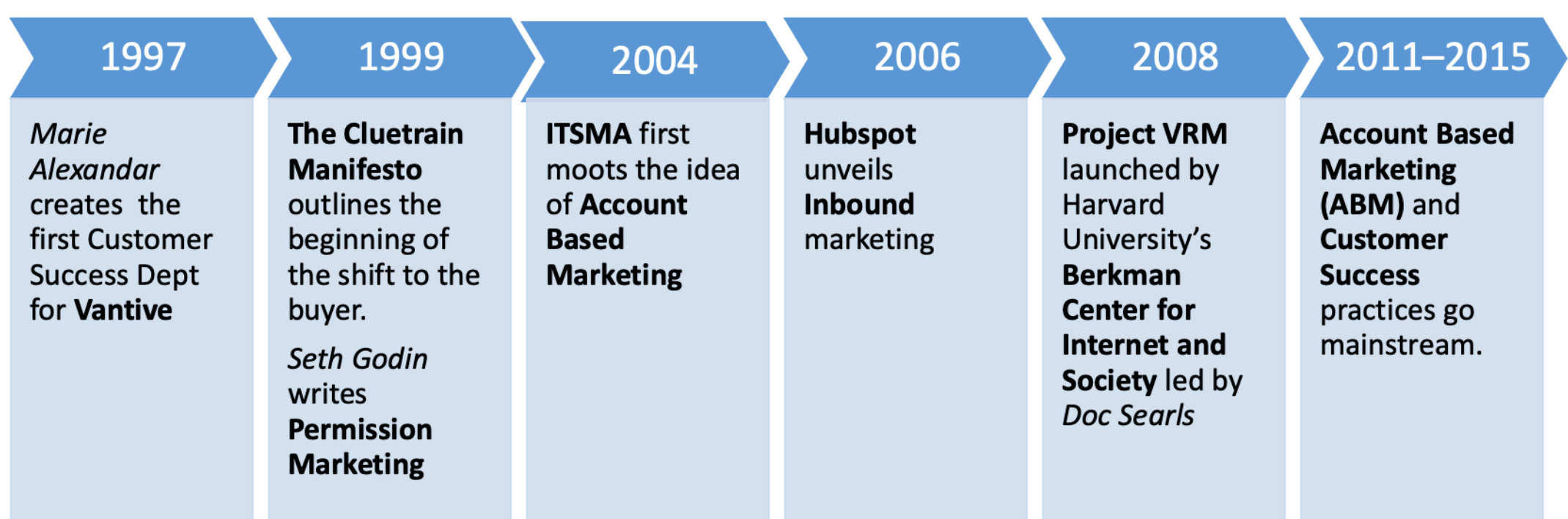
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## Prologue

When we imagined Pitch.Link, it was clear that sales was *the* most difficult function in a business organization. While this does not take away the importance of Finance, Human assets, Product Development et al—they are very important without any doubt, the fact remains that if a single function can change the fortunes of a business— it is Sales.

And this is one function at which most organisations fail. Early on we were onto the fact that the buyer we are dealing with is not the same one we sold to— even 10 years back. This was before Gartner’s Spaghetti-bowl imagery of a buyers’ journey was making its rounds. The indicators were all around us from way back.

### The Shift has been in the making for a while



And this is not even an exhaustive list.

There was another indicator that we were missing something here. The abysmally low conversion rates in B2B sales. This, while the marketing and sales trades added 10000 martech and salestech products in the last 10 years. So, it was important to address the elephant in the room. And I decided to plunge right into it when the opportunity knocked in the form of The Sales Experts Channel (now The Sales Education Channel) where we launched the weekly— The eXtraordinary Outcome Show.

I had the opportunity to speak with 28 international experts from 4 continents and at least 10 countries, to try and figure what got us here and how we can get out of the <5% conversion vortex.

What you are looking at is the first of the 6 volumes that we will release over the next few months. You will meet Fred Diamond, Bob Apollo, Art Fromm, Patti Pokorchak and Brad Jeavons in the pages that follow. With riveting discussions that will take you behind the veils that we have lived with for so long. But as we all know, it is time to start a whole new journey.

*Subhanjan Sarkar*

Bangalore, 2022

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The experts were interviewed on the *The eXtraordinary Outcomes Show* for the segment *Fixing the 5% Conversion Problem in B2B Sales*.

# FRED DIAMOND



Fred Diamond is the President and Co-founder of the Institute for Excellence in Sales and the Host of the award-winning 'Sales Game Changers' Podcast and daily webinars.

Fred started his career in marketing at Apple Computer,

Compaq and Compuware. Prior to starting IES Fred was a marketing consultant to companies such as Microsoft and Oracle.

IES members include the likes of Salesforce, Amazon Web Services, Oracle, Tableau Software and dozens of other top-flight companies around the globe. Fred is very proud of the IES Women in Sales Leadership Forum and the annual IES Sales Excellence Award event.

*Subhanjan(SS): Fred, welcome to this segment on Extraordinary Outcomes, where we are focusing on the abysmally low conversion rate in B2B sales. This seems to be the elephant in the room. Nobody is talking about this problem.*

**Fred Diamond (FD):** Thank you so much. It's great to see you. And I know we're on the Sales Experts channel together, and I'm always excited to speak with anybody about professional sales.

*SS: So, from your decades of experience and looking at B2B sales extremely closely, and also with your current focus on sales training and teaching— where do you stand on this issue?*

**FD:** It's interesting. So, we're talking here about how many leads should be or can be converted into prospects— from suspects into prospects, to use that vernacular. And it does range anywhere from 1.8%, we've heard, all the way up to as much as 5%. So, **the key thing, though, isn't necessarily the metric, it is making sure that people are focused at the right place.**

We're doing today's conversation in March of 2021. We're a year into the pandemic, if you will. And one of the things that we've heard from a lot of our member companies at the Institute for Excellence in Sales is that sales leaders were telling their people, you've got to make more calls. You know, we're still in a pandemic. You've still got to make a 100 phone calls. Well, that may not be the best way to motivate your people these days. We talk to a lot of SDRs— the early stage, the top of the

funnel, if you will, who aren't getting through to people, maybe because their customers are focused on other things right now—and that can be quite demoralizing.

*SS: So if we do agree that we have a problem in terms of the number we are converting from the number of “leads”— we can talk about qualification. I mean, there can be many reasons. It's not only one thing. It can be the way we are setting quota. It can be the way we are compensating our SDRs. There can be many different reasons. If we accept that is a genuine problem— this 1.8% to 5% or 8%— what according to you, should be done to fix this? Because if we don't fix it, we will continue to spend most of our time chasing leads which will never convert.*

**FD:** I reflect back to when I was a VP of marketing for a technology company in 2000. And we had a trade show which we went to. And we brought back 200 leads from the trade show. And I remember that we handed them to one of the sales reps and she sent me an email later in the day and she said, “Are you kidding me? These are horrible.” I've been in marketing most of my career, prior to creating the Institute for Excellence in Sales. I was a corporate marketing leader for companies like Apple and Compaq and Compuware Software. And I remember thinking, like— here's 200 great leads for you, go to it, let's get some sales! And the sales rep replied back— these are the worst leads I've ever seen. And at that moment I said— OK, let's think about this. What are we handing to sales? And **I've always been of the belief that marketing and now sales enablement, their mission is to accelerate sales. Everybody who's in sales starting at the SDR all the way to the VP of Sales and CSO or whoever it might be, everyone else's job in the company is to put things in place to accelerate that process.** So if SDRs and BDRs are spending too much time trying to get to people who are just horrible leads, then it's just a huge amount of time and energy that's being wasted.

I think, as we're talking about this on the Sales Experts channel, I think it's a sales leadership problem. And I think it goes back to— **are we training our people the right way? Are we helping them understand what we do, what our customers do, and why our customers need to utilize whatever products or services that we may bring to the market?**

*SS: So that triggers two questions in my mind. One is, are we following the wrong path in the manner that we are prospecting or suspecting—whatever it is that we are doing? Is that whole process outdated and not suitable for an era where the buyer is not dependent on the salesperson or the vendor anymore, for his purchase decisions? He has way too much information. In fact, there is enough data to show that the information asymmetry, which used to actually be in favor of the salesperson, has now turned 180 degrees, and the buyer is far more informed than an individual salesperson because not only has he the Internet, he has access to experts, he has enough qualified procurement people in-house.*

*I do a show called the “The Buyer Side Chat” where I talk to procurement people—and they are all subject-matter experts today. So the environment has changed. Yet we continue the suspecting-prospecting practice the same way we used to 15 years back.*

**FD:** Now, that’s a great question and I agree with you. I think there’s one place where I’m going to disagree, though. Because the Internet, social media, access to experts, there’s obviously tons more information available. You may not need to speak to a sales professional. If we’re talking about an app, if we’re talking about office supplies, it may not be that critical.

But **when we’re talking about complex software, we’re talking about mission-critical software, we’re talking about medical devices, what we’ve seen is that customers don’t necessarily know everything from access to the Internet.** So, sales professionals moving forward have to be elite. We’re using the word elite a lot at the Institute for Excellence in Sales because **sales professionals, to be valuable and credible and worthwhile to their companies moving forward, they need to be able to crisply understand the needs of their customer. They need to crisply understand how their technology or solutions play that role. And they need to be thinking, 1, 2, 3 years out,** about where the customer is going. It’s a challenge for the SDR position to be looking further out because their job is— OK, here’s the 20, 50, 100 calls I need to make today, because we believe that’s an important metric. It goes back to what you were saying— because of decades of sales process.



So what we're saying at the Institute for Excellence in Sales, with companies like Amazon and Salesforce and Red Hat, companies that are members of the IES, is that they should be taking a more forward look into equipping their people, so that they understand the challenges that the customer is going through. Not today, but into the future. And it's become especially critical during the last year because basically every customer in the world has three things in common.

How do we get past COVID, the quarantine, the lockdown, the shut-down, all of those things? Secondly, how do we get past all the financial challenges that have hit the industry and hit companies because of COVID and the financial repercussions? And third, maybe something impacts your industry if you're in the sports industry obviously, there aren't people in seats, or the entertainment industry. Health care has been completely flipped.

Cloud technology providers have been accelerated like nuts over the last year. So everyone's dealing with that. Is our sales process in sync with helping our customers emerge from one of those three things? And if we're calling them a hundred times a day and saying— "Hey, it's great to hear you! How are things going during COVID?"— well, we should know how things are going for them during COVID, because we're all going through it together. How are we providing value to the customer if we are just calling them 100 times a day and saying— hey, is there anything you need, how are you? That probably isn't providing a whole lot of value to the customer.

***SS: That's a great point. Because I think that's where the disconnect is absolutely clear. What I hear you say is that we really have to get into the buyer's journey. Not what we define as the buyer's journey, but the real buyer's journey— way ahead of time, way ahead of the decision-making point— which can be 18 months, 24 months down the line. Which also means we have to be extremely patient - our entire compensation process, and quota system, all of that has to change. And our reliance on buyer intent data, which is the buzzword today. Buyer intent data is available at the last point. I mean 60, 70% of the job is already over by then. By the time you find buyer intent data on the Internet, and somebody picks it up and tells you— hey, you know what,***

*this guy is looking for X and you sell X, so why don't you go and talk to him, he has already spoken to five vendors. That's I think, what is happening and where the disconnect is. Would you agree?*

**FD:** Yeah, I do. And maybe he's looking at one vendor, and that's enough. So I really like your point here. I do a webinar and I talk to sales leaders or sales thought leaders such as yourself. And there's been three main things that have come out. But I'm just going to focus on two of them. One of them is the need to create value like you've never created before. And sales, especially enterprise and complex B2B sales, has always been about value creation. **People don't need to talk to you if you're not providing some type of value. And here's the thing; like we alluded to a few minutes ago, every customer on the planet has a need for more value from partners.** I'm going to classify the sales organization as a partner, only if you can help them get past those three things right now.

Although, I don't want to confuse the issue by saying that, yeah, we have 18 months now to solve the problem. We've still got to sell things. In fact, sales is the only organization that has been getting companies out of any challenge that they might have faced over the last year. And we've spoken to some companies that have had their best year ever in 2020 and some that are off to the best year ever in early 2021. And we have some that have had a huge challenge. And the companies that pivoted - although one of my least favorite words of all time is pivot - not necessarily pivoted what they offer, but pivoted in their message, are the ones who have emerged, if you will. Because they understood, OK, yeah, we have to sell and get out of here. But we're only going to be successful if we're providing value to help our customers achieve what they need to achieve, because of all the challenges of the last couple of years.

And I think one of the great results of this last couple of months, and I hope we don't lose sight of that, is the realization that sales professionals need to provide more value than ever before. It's always been about value. And, you know, just to use an example here about the SDR process, you and I probably get tons of emails. I got one on LinkedIn just before we started the talk. "Hi, Fred. I see that you're a CEO of a company, so you probably need more leads. Click on my calendar button here and let's

talk about that.” We call it Connect and Pitch. And I now call it “Connect, Pitch and Block.”

I run a small company. So there’s zero value that you’re going to provide me. Because my challenge isn’t more leads. My challenge is providing more value to my customers. So imagine if you’re an SDR with no insider knowledge into your customer and you’re reaching out to, let’s say you get a CIO, a Chief Information Officer, on the phone for some reason, and you say— hey, you must be challenged with productivity. Click on that. I am not challenged with productivity. I’m challenged with something else that you should have known, sales rep, before you were able to connect with me. So just to wrap up that part of the conversation—**professionals need to be elite by providing value for the customer.** And that’s first and foremost. And maybe it takes twenty times to get through, so that process is still in play, but it’s not about getting them finally on the phone or to reply to an email so that you could say something ridiculous, like— gee, you’re probably challenged with productivity. That is the lamest thing. And you will be out of a job and out of a career if that’s how you approach it. And I believe if you’re a sales leader, your time is going to be short because that’s not how you need to lead and manage people right now. What do you think?

***SS: This is a very important point, because I have been looking at a set of data connected to exactly this. One of the things I noticed is that the average tenure of a VP of sales has now dropped to 18 months. Most VP of sales are losing their job in 18 months, and this is not a COVID phenomenon.***

**FD:** No, it is not. In fact, I do a podcast— it’s called the Sales Game Changers Podcast. We’ve had over a million downloads. We won some awards, and I’m up to episode 335. So today we posted episode number 335, and I typically interview sales VPs. And I’ve gone back to the list a couple of times to reconnect or connect. And I was amazed at how many of the VPs of sales that I interviewed — I’ve been doing the podcast since the summer of 2017, and out of the 50 first episodes I’ve done, probably 30 are no longer in that job that they held just three years ago! So that’s longer than the 18 months you talked about. It’s actually 2021 today, so I guess I’m coming up on four years now. But yeah, it’s a tenu-

ous position and yeah, sure, there's external factors like acquisitions and things like that. But it's a tough gig.

And I think— just a last comment here about why I believe there's a lot of disconnect here— it's really hard to be successful in sales, and a lot of things have to go right— the timing and the solution and the product and your market, as well as macro things like a pandemic or, you know, 9/11 or whatever, or just to manage your team. Right now, if you're a first level sales manager and you were promoted in February of 2020, and you've never been in the room with the people that you're managing, and your only exposure to them is over the internet, so you're telling them you need to keep your camera on all day.

I'll give you one last example here. We work with a lot of world class companies and a lot of them have young people as SDRs or early-stage. Back in January, I got a couple of mid twenty-year old SDR types asking if they could spend some time with me. I'm always interested in talking. So I remember I had two conversations in a row one after another around five o'clock Eastern Time in the United States. One of the reps was in Chicago. One of the Reps was in the Boston area. And they looked horrible, you know, and these are smart kids. And they looked like wrecks. One of them was wearing a baseball cap, turned backwards. And since we were doing zoom, I could see into their apartment, and I saw a pizza box on a table. And in the other one I saw what looked like some dirty clothes. And these guys were like— my company has told me since I'm home in my apartment, might as well be working— can't go to bars, can't hang out with friends. So if you're awake, might as well make some phone calls. That's ridiculous.

That was horrible. I was thinking to myself, how are these people being led? "OK, hey, I'm giving you a computer, giving you a second monitor, you can't go anywhere, so might as well work." No, that's not right at all! I hate the term life-work balance, but you can't expect your salespeople to be working around the clock just because they're stuck in their apartment.

And I don't want to mention the companies. They're not members of the IES, but people that we've had some association with. So, I think it's a huge leadership problem with sales leaders. They need to figure it out

quickly and step up. They need to take care of their people today. We're doing this broadcast on International Women's Day. I know it's going to be listened to in the future—but are we taking care of all the women who are also managing the household? And imagine if you're like a woman who's a VP, who's leading a team, and you have three kids under the age of 15. And what we're expecting them to do—it really isn't fair. We really need to take a deep look at what are we expecting and how we are managing our people.

*SS: I completely agree with you about the value part. As I said, I talk to buyers because I think that's one of the things missing from the discourse. We don't talk to enough buyers. We don't have enough discussions with buyers. And what they say is that indeed your product has to match my needs—but that's only the basic box that needs to be checked. Would I negotiate on the price? Yes, sure I would—but I'm not going to buy because of that. I'm going to buy because I can see a value roadmap for me over the next five years.*

**FD:** And that's a cool point—“for me”. **Is there a value proposition “for me”? Not for my organization, not for my bank, but for me. If I'm director of procurement or CIO or CTO of the bank, you need to understand,** as the sales rep, you need to really understand, before you get on that call, before you even reach out. It's all about value, even more so than ever before.

The other point we didn't talk about was “preparation”. And it's not just making sure I'm prepped for the call. “Oh, yeah, I just looked at their website for the first time ever”. No—it's that you thought through the messages for that particular person and their company because of what their company is going through.

Let's use banks, for example. A bank is not a bank is not a bank. Every large bank is different. Mid-banks are different, small banks, business banks, regional banks—a lot of banks just service a particular industry. Maybe if they're in Iowa, they service farms, I guess. So a lot of times the customers that they're servicing maybe have an interest in a specific industry. And buyers just don't have the time anymore to waste.

One of the other challenges right now that we're all facing, is that it's not

just that sales reps who are working from their basements or from their bedrooms. Customers are at home, too. So, they're dealing with the same challenges that we're dealing with as humans—managing our kids, managing our parents.

**So sales reps, you've got to do two things. You've got to figure out the value that you can bring to them. And you really need to spend time reading, preparing, becoming an expert in your customer's industry so that you could be of value to them.**

*SS: So shall we conclude that, the first problem is potentially the sales leadership. And from that, most of the other things that you spoke about, follow. Such as prepping the SDR or even AEs, whoever they are, and that you stay focused on the value that you can deliver as an organization. And prepping them and making them understand if this is the buyer persona, this is the value we bring to them. That's where the disconnect is, really, I feel.*

**FD:** You know, it's interesting, I talk to SDRs, account executives, seasoned sales professionals, and when they ask me, Fred, what do you see? What should I be thinking about right now? I always say two things.

**You're the vice president of your life, so you need to take your career seriously. And if you're in sales, it ain't about smiling-dialing. It's about value to your customer. That is how you will succeed. Sales professionals who I deal with, who have had lengthy, successful careers, understood their customers.** I really believe that they understood the challenges their customers were going through, why they needed their solutions, and where they were. And the second thing I tell them is get to know an industry—**become an expert in your customers' industry so you could engage at a minimum in value conversations with the buyer. If you're selling to the government, you need to know what's going on with budgeting and you need to know what's going on in terms of strategic direction in your agencies.** And you need to know what the customer's mission is. You've got to become students of those things.

And great sales professionals understand technique and they understand active listening and they understand how to do a great presentation—the skills, the chops, if you will. But all the ones who are very, very success-

ful are **passionate about helping their customers achieve their goal.** And the only way you can get there isn't with broad statements. It isn't with slick approaches. It's with truly saying to them, you know, "what do you think the impact is going to be of this regulation that the government is thinking about imposing on your industry?" Few sales reps ask those kinds of questions. And before you even ask the question, give it a little bit of thought. If you're on the phone with a CIO and you're saying, what do you do about this new regulation that's going through the house? "Oh, that's going to be problematic for us. Do you have any idea, sales rep?" "Well, you know, I was kind of thinking, you know, this is a new thing that we have in our solution that allows blah blah blah." So, think it through. Even if you're in your first job as an SDR. Typically, SDRs— it's their first job. Maybe they're just out of school, they want to learn about sales. They're typically being trained by the company on how their technology works and how they do things. "Here's how we dial the phone. Here's how HubSpot works." All those things. But spend time on your own at night reading about your industry, becoming an expert on your industry— that will set you apart.

*SS: Final question. The fact is that the whole sales discourse is full of techniques, full of shortcuts— what short 30-second script can hook the CIO so that he listens to a novice 22-year-old SDR? So a lot of that nonsense fills our discourse. But another big problem is also that we are not recognizing the fact that the buyer has fundamentally changed. His buying has fundamentally changed and we're refusing to recognize that. That is also part of the problem.*

**FD:** Yeah, I agree. And that's where sales leadership comes in. Often the SDR is tasked — you've got to make 50 phone calls a day, here's our message, here's our script. Instead, we just emphasize how they can **distinguish themselves by doing the extra work at night, spending time— instead of sitting in front of the TV, watching sports or whatever— going to the Internet and researching challenges facing banking CIOs, challenges facing banks in the next five years, truly becoming someone of value to their customer.**

And then I believe it is sales leadership's job to figure out how our customers are buying, and to understand buyers through organizations like

sales enablement. And **marketing people need to get smarter about the shifts in buying** and. So SDRs and BDRs should take it upon themselves to become experts in their customers' challenges. That is how they can become valuable to buyers. Because you're right, they're probably not doing the research on some technology—it's probably the IT team or the CTO, and it's the CIO is providing the direction, so to speak. So how you are providing value to how I can solve my customers' challenges, is where you need to focus.

Sales leadership should think about how the process has changed. How do I better manage my SDRs? How do I get them to be of greater value so that I can have a job for more than 18 months? I mean, as I always tell people—if you want to get a promotion, get your boss promoted. That's the easiest way to get a promotion. And it's an interesting position—Sales leaders—they don't want to show themselves as being too vulnerable. I've spoken to some leaders. I did a great podcast with a leader named Melissa Merwin. She runs sales for US LinkedIn business. And her whole conversation with me was about being vulnerable and letting people in your team know what you don't know. And there's some risk in that. But a lot of sales leaders are afraid to ask people below them—what are you guys seeing out there? Because they want to be seen as “I know everything, I'm the leader”. And that's a challenging place to be in, because it's moving. It is moving fast and there's a lot of new things. But you've got to figure out how to be on top.

*SS: It's interesting—some people today admit that their children know some things better than them, and they have no problem in letting their kids show them the ropes, show them some new technology. But that behavior somehow does not get mirrored in the office.*

**FD:** That's a really interesting point. I would think if you're the kind of sales leader who—and I've worked with many sales leaders who admit they're vulnerable. I remember, I did an interview because it was relatively early on with a guy named Dorian Kass at Neustar. And he said, when I got my master's in business, there was no course on selling through a pandemic. And we've kind of figured some things out now. There aren't many new surprises coming now a year in. We don't know necessarily when immunity is going to kick in. I'm still talking and some sales lead-



ers have said we're not going back to the office until January and we're telling our people you can't go to an event until January. But, yeah, I mean, for sales professionals, for leaders, based on your comment—figure out a way to be vulnerable and learn from your people.

***SS: Absolutely. Thank you, Fred. I really enjoyed our chat. I hope you did, too. And I would hope that we'll talk more.***

**FD:** This is great, I appreciate it.



## Fred Diamond

President and Co-Founder, Institute for Excellence in Sales

<https://www.linkedin.com/in/freddiamond/>

### How did we get here?

- . It's really hard to be successful in sales, because a lot of things have to go right.
- . Such as the timing, the solution, and the product and market fit.
- . The key issue, however, with low conversions rates may not be the metric itself.
- . Marketing often hands over very poor leads to sales, and so the volume of leads gives a false impression.
- . A huge amount of time and energy is then wasted by SDRs and BDRs trying to reach those bad leads.
- . SDRs and BDRs aren't getting through to customers also because they are not focusing on the customer's real problems.
- . It is a sales leadership problem that there is no proper training that can help people identify good leads.

## What is the solution?

- . Enterprise and complex B2B sales has always been about value creation.
- . Every customer on the planet has a need for more value from partners.
- . Sales professionals need to be elite by providing value for the customer.
- . They must be passionate about helping their customers achieve their goal.
- . The only way to get there isn't with broad statements, but by becoming an expert in their field.
- . Sales reps must research the challenges facing their customers now and in the next five years.
- . Beyond that, sales professionals must understand technique, active listening, and presentation skills.
- . Sales leadership must train salespersons to become experts in their customers' challenges.
- . Training must equip salespeople to understand how and why customers utilize the products or services sold.
- . Sales leaders must share their vulnerabilities and learn from their ground force to create better teams.

# BOB APOLLO



Bob Apollo is a Fellow of the Association of Professional Sales, a founding contributor to the International Journal of Sales Transformation, an active member of the Sales Enablement Society and the driving force behind Inflexion-Point Strategy Partners, the leading proponents of

outcome-centric selling.

Following a successful corporate career spanning start-ups, scale-ups and market leaders, Bob now works as a strategic advisor, mentor, trainer and coach to ambitious B2B sales organizations - teaching them how to differentiate themselves through achieving their customer's desired outcomes.

*Subhanjan(SS): Bob, I'm really delighted to have you on this chat, not only because of who you are, but I really enjoy what you write. I have followed you for a long time. Bob, the question that I have for you is that there is this very low rate— an abysmally low rate of conversion from lead to final sale, that's plaguing the B2B sales environment. I know we don't agree on the number, and I'll ask you for your number, but there is no debating the fact that something is definitely wrong with the way we are selling business to business.*

**Bob Apollo (BA):** I think that's true. I think we can have an educated discussion about the number. I will tell you that I have a general problem with statistics like that because they're only ever— averages. They very rarely explain the context behind the measurement. It's a bit like the classic statistic that the "Challenger Sale" quoted several years ago, that customers, however they measured it, were X% of the way through a buying cycle before they wanted to talk to a salesperson, and of course, the truth of the matter is, that's a sliding scale.

**If I'm a customer with a very clearly defined sense of what I want to buy, I'll probably defer wanting to talk to a salesperson. But if I'm a customer on an unfamiliar buying journey, if it's the first time I've tried to purchase something like this or to solve this sort of problem, I'm probably more inclined to want to engage with a salesperson early.** So my answer to most statistical quotations is - it depends. You have to understand the context.

*SS: Yes. However, I think the fact is that 20 years back the buyer used to rely on the salesperson for most of his information, because the*

*salesperson was going around, he was meeting similar companies, he was looking at problems and so on. So the salesperson was always having the better part of the information asymmetry that existed then. But because of the disintermediation that Internet has brought in, that information asymmetry has shifted in favor of the buyer.*

*And the buyer truly has a lot more access to information than a single salesperson will ever have. So that, I guess, sort of puts that in a context as to why. I do agree with you, that number could vary, and we are not fixated on that now. Just to quote one more related point—you see how many salespeople are not making their quota. So, what, according to you, is really plaguing the lack of outcomes in B2B sales?*

**BA:** So I think there is generally both a quantity and quality problem. And I think **the challenge is, there are a lot of sales leaders who are still placing too much attention on quantity. They think that they can solve their quota achievement problems by getting the salesperson to make more calls or by generating more leads.** When I think, in the context of what I'd characterize as complex B2B, lengthy decision cycles, which are very often a discretionary rather than an inevitable purchase, it would be much better for sales leaders to place more focus on the quality in every step of the process. If you **think of the quality at the top of the funnel, it involves having a really clear sense of your target audience, the business issues you're seeking to solve, who is likely to be suffering from them, and what the trigger event or catalyst is,** that's likely to make them recognize that they need to do something.

I think if you are intelligent in your thinking at the top of the funnel, your generation may be fewer—whether you label them leads or inquiries or what have you. But you will be generating better. And because you're generating connections with customers that are more likely to be predisposed to find a solution, you're going to have a better-quality process and a more efficient process.

That's the top of the funnel challenge. By the way, I agree with your assertion that **20 years ago the salesperson was the fount of all knowledge or a lot of knowledge. And I think the role of the salesperson has changed.** I'm very much in line with what Gartner have written recently about the role of the salesperson as a sense maker, somebody who can in-

interpret all of that information, who can filter it, who can help the customer navigate their way through what might be an overwhelming amount of information.

But it's not just product information. It's also business acumen, the shared experience of other similar customers and so on.

*SS: This gives rise to multiple issues. Let's accept that most companies are in the commodities business. They're selling something which is pretty similar to five other companies selling them. To get an enduring differentiation is very, very difficult. If all the salespeople selling a commodity X, which is sold by say, five companies, all five have done the quality lead search and have engaged in discussion, then all of them bring in the same kind of expertise. And if all of them analyze data and present similarly, what does it boil down to then?*

**BA:** Well, yeah, and let me firstly sort of characterize my experience, because I self-select companies that tend to be in a more differentiable environment. So I can't talk honestly with great authority about B2B companies who have a, what might appear to be a completely undifferentiated offering. The examples might be raw materials, energy. But I believe that even in that environment, it is possible to differentiate not based on product functionality or claiming that you have a better product or how you might compete on price, of course. But that requires very little salesmanship. I think even then there are vendors in that space who have been able to position themselves with a different approach. So maybe they wrap expertise, maybe they wrap services, maybe they wrap knowledge about the application of what appears to be a commodity to the customer's environment; but I think it is a very dangerous game if you're in a commoditized environment to claim that you have a better product because everybody is claiming that.

And it's really hard to prove. And any way there's an arms race going on, somebody adds a functionality, somebody else copies it. So my guidance, whether actually you're in a commoditized environment or a differentiated one—a naturally differentiated one, is to **focus your positioning on how your approach is different rather than leading with why your solution or your product is better. I think that's a really important mantra. Different before better.**

*SS: Two quick questions. One is that - from what I've heard so far, and going back to your quality of leads point, is that salespeople need to figure out how they can get really early into the discussion with the customer, whenever it is possible. This implies very long sales cycles, yet potentially guarantees a seat at the table.*

**BA:** I think that's absolutely right. And by the way, **it's why using BANT— Budget, Authority, Need, and Timeframe is such an inappropriate way of qualifying early-stage opportunities.** Because if you wait until a customer has formal budget, has full authority, has a clearly defined need, has a defined timetable, they are already a long way down the decision-making process. So it might seem to extend the sales cycle. But we are not really extending the buying cycle by getting involved early. You're finding yourself at a point in the customer's buying cycle where you can actually do something to influence their thinking. So I think that it's not so much starting the sales cycle early, as engaging in the customer's buying process as early as you can, before they have formally defined what they're looking for and how they'll choose between their options.

*SS: Absolutely. So that brings me to the other issue. That is what we define as our sales path or journey. And the fact that the buyer's journey is completely different, whereas we want our narrative to move from stage one, to stage two, to stage three and so on— Discovery, and then Demo, and then whatever. And the buyer is making some very random movements. I mean, he's not following that path at all.*

**BA:** So I think it depends. I think if the buyer is, for example, reordering raw materials for their factory, they've probably got a fairly well-defined process. And they probably think of what you're offering as a commodity. But if it is an unfamiliar buying process, I think this idea of linearity is completely wrong. **You have, as you've mentioned, sales cycles, which are defined in terms of activities the salesperson completes. But I think in a complex B2B environment where the customer is making a discretionary purchase, you have to think in terms of where the buyer is in their journey.** And secondly, you have to acknowledge that it's very unlikely to be a nice, clean, linear journey. They are going to involve new people, they're going to revisit previous considerations, they're go-



ing to challenge assumptions that they might have made earlier on in the journey. It's an ugly process.

Gartner did a diagram of this, and people have described it as looking like a spaghetti bowl. But I think that reflects the reality. And I think **the traditional linear sales process, where you can only move forward through the process—it is completely inadequate to explain this journey.**

*SS: I happen to talk to a lot of buyers and procurement professionals for another podcast that I run. And I hear something very interesting—that they have peer groups where vendors have no access. And there have been scenarios where a vendor has gone home in the evening thinking that he's going to get the order tomorrow. And someone in the peer group has come in and completely changed the decision of the buyer with his inputs. So things got turned around and somebody else got the business.*

*So it's not even the 5.8 people, according to Gartner, who are part of the organization and the decision making, but completely unrelated people outside, having a huge influence. And we have no recognition or acknowledgement of that.*

**BA:** I think that's a very interesting point, I hadn't stumbled across that research, but I think I can see exactly how it is likely to pan out. In buying environments, let's acknowledge it, people in different roles within the organization, members of the buying group, will have what they regard as their peer group. So there's a sort of one internal peer group, and then, let's say an operations director might see value—real value, in having an informal or formal network of industry association—call it what you will. Or just an informal group of other operations directors who are in a similar position. They may be simply being linked to, or connected on LinkedIn.

So absolutely, I'm sure those formal or informal peer group relationships are informing decision making.

*SS: Absolutely. So, Bob, tell me, in the complex B2B environment, how do you see the buyer having changed? One of the things you said, that oh we are not getting enough leads, so we make more calls. And what*

*has that led to? That has led to robocalls. So we are trying to build technology which will do the same thing in greater numbers, for something that is not working.*

**BA:** I acknowledge that machine learning and artificial intelligence have contributions to make to the sales process, and I can see how in a transactional buying environment, actually even the customer might want as automated a journey as possible. But I think **it is very hard to see in today's climate, and actually even in the foreseeable short to mid-term, that AI can in any way completely replace intelligent human to human conversation.** I think it can support and facilitate it. But I am as irritated as you— by whether it's robocalls, robo-reactions to blog posts, or robo-social-media. I think buyers find that sort thing as both thoughtless and disrespectful— to try and communicate with a serious buyer in that trivial automated way. I think it causes more harm than good. I know I have made decisions never to do business with such organizations. Sometimes even with a human being they're behaving like a robot that's following a script.

*SS: It's about building trust, right? We take building trust very lightly. We think that you connect with someone, send him two nice messages and you have built trust. And I'm really concerned about the fact that I hear from founders like me who say, tracking of buyers, through interaction with collaterals, tracking their mail, without permission and without declaring that they are getting tracked is okay. Yet, we say go and build trust, because trust is the foundation of doing a transaction.*

**BA:** I think **trust is an undervalued commodity, it's the sort of thing that people talk about wanting to achieve and don't do it particularly effectively.** But I will say to you, that in my experience, today's and tomorrow's most effective salespeople are very sensitive and aware of this. And they actually do an excellent job of building trust because it's actually based on a mutual respect with the customer. And not behaving like an automaton.

*SS: True. Coming back to my original question, how, from your vantage point and the vast experience and the number of deals, a number of companies you have seen up close— how would you characterize the change in the buyer and the buying process?*

**BA:** Well, firstly, I think the individual buyers have become a lot less tolerant of a salesperson that's only capable of spouting company and product statistics. They expect to get personal value from every interaction, and effectively, a good salesman must earn the right to continue the conversation. If the customer believes that they've learned something valuable from their interaction with them. So I think **they've become increasingly intolerant of qualification calls where it's all one way. Where the salesperson is asking a series of questions that are for all purposes useful to them, but not particularly stimulating or thought provoking or insight generating for the customer.**

So, again, I'm only talking about complex, discretionary environments. But I think buyers have certainly become increasingly intolerant of just hearing a walking, talking product. They can get that information anywhere. I think they've become intolerant of one-direction conversations. Let me qualify. I think they've become intolerant of packaged demonstrations, which just go through one function after another function without the attempt to relate it to the customer situation. I actually see, as do most of my clients who have some sort of technology-based solution, that there's a growing number of businesspeople involved in the decision. Whereas maybe 10 years back, the IT people leading it may have taken a spec from line business.

I think line of business is increasingly involved. What else? I see the old days where, people wrote sales books about selling to the C level as if you sold to the chief executive they'd just make the decision, and it would happen. Well, there have been so many examples of a top-down imposed decision that hasn't been embraced by the organization buying the solution, that there's a consensus-making in decision-making now—there's a whole raft of important changes.

To pull, again, a piece of the Gartner Challenger research, it shows that **when we think we've got a champion who's supportive of our solution, we need to judge whether they are good internal salesmen, not just for our solution, but actually for the project itself.** Because what happens in a complex environment is, you might think that your competition are other similar vendors, and that's probably true at the start of the buying journey, but at the end of the buying journey, your competi-

tion is actually all of those other different projects that the customer could choose to prioritize over yours.

**And I think the smart salespeople now realize they're not just selling their solution or their company. They're actually helping the customer answer four critical questions** the customer is asking. **Why should they change rather than carry on,** on their current path? The customer's asking, **why should I choose you rather than any of the other options** available to me, including doing nothing? They're asking, **why should I act now rather than later?**

I think the fourth question that the customers are asking is, so **who within my organization will benefit from this change and how?** And I think the really good salespeople are mastering the art of helping the customer answer those questions. And when I look at the summary of proposals, I see the less effective salespeople concentrating almost exclusively on “why buy from us”. And they don't help the customer sell the project internally. So “why change”? They don't help the customer sell urgency right now. And they don't help the customer build a consensus within the rest of their organization. Who else will benefit? I think, this is going to be, already actually is, a really key distinguishing factor between salespeople who are most effective today and the old fashioned old school— even if they're young salespeople, they might behave in a rather old school way of behaving. The customers are just increasingly not accepting that sort of traditional style of salesmanship. Again, I think it might apply in transactional environments. But **if you're trying to sell change to the customer, the standards required of a salesperson to do that effectively have grown incrementally over time.**

*SS: I think in the industrial era we figured out how to manufacture a lot, and then we went out and tried to figure out how to sell those products— didn't matter to whom and at what price. Today it is a very different environment. It calls for a change of lens. You are no longer looking through the same selling lens, instead you have to look through the buying lens and figure out how the path is.*

**BA:** And honestly, it requires a change in sales leadership, so the discussion isn't just about the qualities of the individual salesperson. It is management. It's about investing time, and coaching— proper coaching, not

just reviews coaching. It's about not pursuing stupid metrics like holding the salesperson to "you've got to have three times pipeline coverage", even if a bunch of that pipeline is just never going to close. And as sales leaders, you've got to create an environment where your salespeople behave with intelligence and thoughtfulness rather than just pursuing those pure activity-based targets. Good sales leaders focus on quality of outcome and not just volume of activity.

***SS: Two other things are linked to this behavioral pattern. One is quota. The other is incentivized compensation. Or rather, three things. One is the volume of activity which is linked to your quota, and your incentivized pay structure. I think all of these have to be questioned now because they don't fit into this era at all.***

**BA:** Well, so, one of the things I see in what you talked about— changes in buying behavior, is that, even well outside of software, customers are increasingly turning to buying things as a service rather than as an outright purchase. You know, we see it in all manner of previously unexpected places. Aero engine manufacturers selling on the basis of hours of engine use rather than by the engine. And I think the challenge with the "as a service" model is, is the customer is unlikely to ever be profitable unless they enthusiastically continue to use what you have sold to them. And so part of compensation, I think, is not just about the salesman getting an order and then thinking that the job's done. I think you need to think through how to fix some longer-term compensation based around the customer's successful achievement of outcomes, and your retention of their business and their desire to make more use of your services over time.

And I don't think there's a single formula for that. But I do think that you're in an "as a service" environment, your sales motivation and compensation has to be to do good business and not just to do business at any cost.

***SS: Absolutely. That's a great point to end this chat on. Bob, I really enjoyed chatting with you. And I hope that I'll have more opportunities to talk to you and learn some more.***

**BA:** Well, thank you for the opportunity, I've also enjoyed the conversation very much.



## Bob Apollo

Founder and Chief Outcomes Officer, Inflexion-Point Strategy Partners

<https://www.linkedin.com/in/bobapollo/>

### How did we get here?

- Sales leaders believe they can achieve quota by generating more leads.
- The buyer has changed—he is more knowledgeable today.
- Sales organizations must accordingly transform, but have not kept up.
- Buyers have become intolerant of robo-calls and interruptions.
- Buyers realize when qualification calls are all one way, designed to help the seller and not the buyer.
- BANT and other archaic methodologies are inappropriate for qualifying opportunities.
- We are thinking in terms of the sales cycle, instead of the buyer journey.
- The standards required of a salesperson to sell “change” has grown immensely.

## What is the solution?

- Focus on quality at the top of the funnel.
- Have clarity on the target audience.
- Have clarity on the business issues you're seeking to solve.
- Understand what the trigger event or catalyst for change is.
- Focus your positioning—“Different before better”.
- Don't just sell your solution— help the customer answer four critical questions:
  1. Why should they change rather than carry on?
  2. Why should they choose you rather than any other option?
  3. Why should they act now rather than later?
  4. Who in their organization will benefit?
- Find an internal champion who will support your solution.
- A change in sales leadership and attitudes is critical.
- The compensation model must accommodate for customer success beyond the sale.
- Proper training, beyond mere reviews, is required to empower sales.

# ART FROMM



Art Fromm is the Founder of Team Sales Development Inc and is a sales transformation consultant with a wealth of consultative sales training and development expertise, based on over 20 years of industry and sales experience.



He began in Engineering – and quickly moved into various sales positions where he routinely surpassed revenue and performance targets and led sales teams. Art moved into a Sales Enablement role in 2000, responsible for development of 450 SEs and Partners world-wide, eventually founding his own company, Team Sales Development in 2004.

Art developed the Webinar Mastery™ series and has successfully helped sales teams and trainers at companies including Cisco, Nokia, DBS Bank, Palo Alto Networks, Informatica and also delivered a spectacular increase of almost 1 billion \$ of bookings for a multi-national electronics manufacturing outsourcer.

*Subhanjan (SS): Art, welcome to the show. I am delighted to have you here. And thank you very much for making time. We are going to talk about the elephant in the room, which I believe all sales leaders should to be talking about, but somehow choose not to. Well, that's the discussion today. But before we get into that, I will request you to tell us a bit about yourself.*

**Art Fromm (AF):** Sounds good. I really appreciate the opportunity. And Hello, everybody. My name is Art Fromm. I'm based in Pittsburgh, Pennsylvania, and most significantly to most of you who are listening and are in sales roles, is that my company, Team Sales Development, is focused on helping salespeople to generate more revenue, increase win rate, increase margin, have happier customers, longer and deeper relationships and things like that. So I offer a portfolio of different trainings and consulting that focus on all aspects of the sales cycle from the initial prospecting all the way through customer success.

And I'm in a unique position to do that because I was a customer of software for about eight years, and so I was on the receiving end of a lot of calls. And then in the middle part my career, I was in sales and sales management roles. And then in the last 20 years or so, I've been focused on

sales enablement, helping companies transform their sales processes and methodologies. So it's such a pleasure to be here. And hopefully you and the audience and those listening, we'll get one or two things out of it. And that would be great.

*SS: I'm sure we will. So, let's dive right in. There is this elephant in the room which we refuse to talk about. We don't like to have a public discourse on this, but I think it's time. The fact is that the lead to conversion rate in B2B sales is abysmally low. You can agree to disagree on the 5% number that I use, but I have numbers from research organizations which peg it at 1%. I have numbers which are about 7 or 8%, across geographies and across industries. But by and large, it is within that range. So, Art my question to you is, how did we get here?*

AF: Well, as I think some of your other guests have said as well, I think the numbers can vary greatly. **The point is that there's way too much effort, time, investment put in—that doesn't lead to where we want to go.** And I think how we got here is just because traditionally a lot of sales, you know, used to be maybe more B2C; there wasn't all this B2B opportunities like there is now with SAAS and so many other offerings. And so, I feel it comes from the old adage—you go out and find as many as you can and work on as many as you can.

And the problem with that is, to get more of actual conversions, you've got to put more on the top of the funnel. And unfortunately, that means just more work and more effort. And you could add more people to do more calls. But the question is, is that helpful? And, oh, by the way, a big theme I know of yours and of mine as well is the buyer perspective.

This is not good for the buyers either. The decision makers, the stakeholders, the people that are called. And I think that all too often they get calls from people that are hoping to get something. We all get those emails, those LinkedIn connections, and things where it's like out of the blue, somebody's telling me all about themselves when they don't even know anything about me. And it's very unlikely to stick. So, I think what it comes from is just **the old philosophy of the more calls you make, the more likely you are to get a deal. But it's very inefficient and very often leads to frustration for everybody on both sides of the equation.**

*SS: It's an interesting thing that you talk about—the B2C lead, and I think there is a lot of truth to what you just said, because a lot of what we do in B2B sales are actually the legacy routines that we had in B2C sales. And where that came from is the industrial production era. Stack them high, sell them low. First we figured out to make 1000 cars. Now we'll go out and figure out who is going to buy it.*

*It was linked to creation of market, which means it was not a business buyer who was planning to make an investment over 18 or 24 months, but somebody who didn't know enough and had the money and was ready to buy a car. So, there's a big difference between these two scenarios. Yet a lot of what we do is a sort of a legacy that we are carrying from that mindset of mass manufacture to mass market, that is to get people into the showroom so that they will buy.*

AF: Yeah. I mean, going back, think about the Fuller Brush salesperson as we had in the US. This is a person that went door to door and had a pack full of things that were commonly needed and would show up and say, do you want one of these, do you want one of the these? And they had to go to house after house. And at the end of the day, if they made maybe ten sales by visiting, maybe 100 hundred or 50 houses, they were happy with that.

**Again, the problem with that is, it just leads now to buyer fatigue, salesperson fatigue and a tremendous misappropriation of resources, and ultimately frustration.** So, I think that the key is thinking about what it is that is different now, or can be done differently. That helps the buyer, helps the person on the other end of the phone, while at the same time helps us as the salesperson to determine what we can do about that 5% or whatever you want to call that conversion. So, the most important thing is thinking about it in terms of what goes in at the top of the funnel—being able to sort that through a little bit.

And one of the things that I've worked with some others on is really thinking about what's the strategy of your company, where are you trying to go, what are you trying to do and identify what those buyers look like in terms of something that aligns more to where you really want to take people. You know, there's some methodologies out there to talk about challenging people and things like that. And I get what the point is. The

thing is that people don't want to be confronted, they want to be helped.

And I don't know a single person that won't take a phone call from somebody who is truly trying to help— someone that they can listen to, who can actually make things happen. I know I was listening to an interview a little while ago with Magic Johnson, and he was talking about how he called up CEOs of all these different companies and picked their brain about what it was that they were really interested in. What they were trying to do and things like that. And of course, they took the call because it was Magic Johnson.

But the point is, he was willing to say that he needed help and that he was looking for information. So, I think everybody ultimately is looking for guidance and that is something we can provide to them. And that's where we should start. When I'm making these calls, and I don't know who the other person is on the other end of the line, what can I use as a connection to get things started? So, for sure, we don't want to start by opening our quote up and saying, hey, which one of these do you like?

It needs to be something that gets their interest. And one of the approaches that we've used as part of my portfolio is Great Demo and Great Demo's methodology— how to demonstrate mainly software solutions. But it starts with the customer in mind, and it puts the last thing first. So, whatever your main point is, you put right up front. If you're able to do discovery, that's pretty easy to do because you can find out what they care about. The challenge with the 5% problem is we don't necessarily know much about them.

But here's what we do know. We know their job title. Most likely, we know their industry. We probably have a good idea about the people from those with whom we've worked with before, and what they are thinking about, what they care about.

So, what we advocate, and something to consider, is what we call vision generation. **So, in vision generation, what you do is you put a scenario up without even talking about yourself first, at all.** Put a scenario up— hey, you know, my understanding is that you're the project manager in charge of this or you're the factory floor person in charge of this. When we've worked with others like you, they have said this is the challenge

they have. They have said these are the things that are getting in the way of achieving their goals. They have said these are the things that they are looking for in terms of the solution. And what I like about that approach is we are helping them to see a third perspective of somebody else and what somebody else is doing that we have worked with. We don't even talk about our solution yet; we start by giving them a little bit in order to get there.

And what that does is it creates some credibility for us in terms of hey, this is a person I might want to listen to because it sounds like they know my competitor. They know others just like me. And what can they give to me to help me out? It also helps in making sure that we aren't trying to push our stuff first. And I'll tell you what, if you got a salesperson on the phone and the first thing they start talking about is you instead of them, it probably would feel a little different.

So, this is one of the approaches, and I can talk more in detail about that in terms of the benefits, in terms of what it does. But I think you could start to realize that it helps weed out and determine if we are even talking to the right person, and generate some hope and curiosity for them.

***SS: Absolutely. So before I actually do a deeper dive into the solution, let us analyze the problem a little bit more. The expectation of organizations is that this SDR, who is the newest recruit of the team, he's going to solve this problem because he is going to prospect better, because he is going to make those extra calls. And so the problem, which is impacting the entire organization, is now in the hands of the junior most. personnel. So, isn't the sales leadership actually passing the buck?***

**AF:** Well, I don't think entirely. So, I've worked with a lot of brand new, and it's amazing to me, many companies are doing a great job of hiring people right out of college, and they have a new hire program, an Academy, so to speak. And they are using those people who not only don't have any sales experience, really, but no industry experience to drive some of this. And I've often thought, how can that possibly work? They must at least have to have some industry experience or something to be able to get those calls.

But looking at it their way, those type of roles, their main job is not to get

the sale. Their main job is to start the sales process, to start the buying process. Their goal is to get the next meeting—that is their close. Their close to get a meeting where the prospect says— yes, this looks interesting enough to me, that I'd like to talk with somebody in more detail, or I believe you have something that can help me out in terms of solving my problem or help me achieve my goal.

And therefore, I'm willing to take a meeting with the next person that you can set me up with. Now, should they be, from the very moment they start talking with the prospect or the lead, should they be thinking about the ultimate end of the sale? Absolutely. They can be gathering information already and thinking about what it would look like for them to decide to move forward, what's the potential risk that keeps them from moving forward and things like that. They really, their only goal is, and I admit it's a big goal, is to get that next meeting.

And if that next meeting is done, because the buyer likes what they saw, I like to call it return from a push into a pull, right? Instead of us trying to push a bunch of stuff or throw it against the wall to see if it sticks, let's put something out there that intrigues them and get them interested. So, they say, hey, I like what I see so far. What else can you tell me? Where else can you go with it?

Now, our conversion rate of that first interaction is going to go up, and it sets it up for more success down the road. And I think it helps to build that credibility. So, I think that it's okay to have those type of roles, because you need your experienced sellers to be the ones that now take it from there and continue on through the rest of the process. And by the way, all these people that are doing this will eventually become experienced sellers. So, it's good that they see what this looks like on the front end.

And one of the things I know that many of the academy programs do is, they get them talking with sellers and do ride-alongs and all that, that allows them to see the downstream. But oftentimes I'm brought in to talk with these folks up-front. They might be looking at etiquette or meeting control or things like that. And that's not what I specialize in. It's about transformation. So, yes, those are important. But what is the real job? It's to get the whole process started. "Get that meeting" is their close.

*SS: The last question before I go to the solution is, how much do you think is the disconnect between marketing and sales contributing to this problem?*

**AF:** I think that's a whole other dimension. Somewhat it does, because, again, the people that are making these initial calls or those who are getting the inbound calls, need to be equipped with enough information to know the type of things the caller, the prospect, the buyer is going through. They have to understand enough about their world so that they can relate to them and have empathy around what it is they're trying to do instead of— "Oh, Hi. Hello. You're calling ABC Company. You want to see what I have? Here's what I have". That doesn't work in marketing. And with all due respect to marketing, (and I know it's getting better) but many a times, I see a lot of feature-function stuff— it's all about us, it's all about our product, maybe a little bit about what it does. **What's missing is— how does that help the customer? Again, keeping the buyer, the end stakeholders in mind** when marketing department can create that for the CSRs, the BDRs, whatever title you want to give them upfront— that allows them to have something of substance to offer.

And now when somebody comes on the line, we don't want to start with what it is we're doing. We want to find out what it is we can do for them and what others are doing. And that's where I think marketing can come in, which is a big challenge— to come up with the right stuff. But I think being plugged in more into that at the front would be a big help.

*SS: Great. So, let's move on to the solution. So according to you, how can we fix this? How can we fix this really low conversion rate? To start with, is the funnel still the right way of doing it, which means getting in a lot in at the top and getting a few trickles down at the bottom?*

**AF:** Yeah. Well, the funnel is necessary no matter what, because unless you have such a demanding business that people just come to you and sign up, you have to go out and prospect and market and all that stuff. So, it's a reality. The thing we want to change is that 5% that we're talking about. **So, the funnel for me, should not be all the way through the sales process to the end. The funnel needs to be right at the top, then develop into a pipeline of most likely things that could close.**

So, part of the problem, I think, is that there's a tendency for a salesperson to want to chase everything because it's like— oh, you never know what deal might land. So, you tend to want to chase everything. But that's the traditional funnel of putting more stuff at the top to try to get more out of the bottom. But your percentage of closing is still the same. It's just maybe more volume. On the other hand, though, I've got a lot more work to do upfront, which is not efficient.

So, what can we do to neck that funnel down more quickly at the top, so that it becomes a pipeline of more likely deals to close? I like to think of an analogy. Let's say you're going to buy a cake, right? When you go to the bakery, when you walk in, they don't say, what kind of flour do you want? And we have five different kinds of flour. We have three different types of frosting. Which one do you want? What they do is they show you the baked cake.

They get you interested; they show you the result upfront. And then if you don't like any of them, like, for me, personally, I don't like coconut, at least not on my cake. So, if I saw a cake that had coconut then I wouldn't be too interested in that. I'll check somewhere else. Right? If I see that finished product. So, the equivalent of that for sales would be, what could we do to without actually talking about ourselves? But what can we show upfront that would help to neck that funnel down so that we can find people that are most aligned?

And I think it starts with— what is your strategy and who is it that you're going after? What is your best fit? We shouldn't chase after everything. What do we want to say is in? What do we want to say is out? I know one customer I was working with, they spent something like nine months and \$2 million chasing after a deal that wound up being the wrong deal. And so they wasted all that money, all that opportunity cost, and wasted the time of the customer.

Of course, this was further down in. But the point is, they didn't do a good job upfront of eliminating them as a customer they shouldn't chase. So, what can we do to align with our strategy upfront, that helps guide us? Secondly, what can we offer in the form of, like a baked cake, to increase their curiosity? So that they're like, oh, that looks interesting to me— I like that chocolate cream pot, and I want to dig into it. How can



I do that? What is the way it looks for me? And what are the nuances for me?

And I think that that's where we can offer up some of our experiences working with others. Case studies and customer success stories on the website are intended to do that. I don't think people have time to read through that all the time. And surprisingly, here's something that you could do. **Go on your website, and if you're marketing— take a look, and see what the success stories are really saying. Who is it about? Is it about the customer— what they were able to do, or is it more about what you did?** And I'm shocked that many customers I work with, I go on there to pull out examples and things. And all I see is here's our features. Here's our functions. Here's the ingredients of the cake. And, yes, we delivered a cake. Well, so what? What can I do for them? What's in it for them? So, thinking about what's in it for them— even in that funnel part. And CSRs and BDRs— what are you going to bring to them?

Who have we worked with similar to you that's going through this? And now when we offer it up at that funnel part where we start to look at getting it into a pipeline, let's do a little pre-qualification right there. If the person looks at it and says, that's not me at all, no, that's not what I do— okay, now we can have a discussion. Now we're going to get into some discovery. What's the same? What's different? If there's no match at all, thank you for your time. We respect that. Hope you could find a solution— or even recommend them to somebody else. If it looks like there's a match, we start doing discovery. We start to document it. It starts to look like it's going into that pipeline that's more qualified, something that's more aligned.

Back to the traditional sales, I think a lot of times for SAAS, at least, and the IT, telecommunication, high tech companies I work with, there's this tendency for the salespeople to always just be calling an IT person. And I think that creates an unnecessary funnel because a lot of the people that are in IT are just the implementers. And, yes, they could say no because they don't agree with the solution, but they can't say yes to go find budget and things like that. So, we spend a lot of time, and they wind up way down in the process, in the funnel. And it turns out they were just curious. They were just looking for technology. So, think about things like what's

the business benefits upfront.

So that's a half a dozen or so ideas of where it could potentially help to neck that down and get the funnel out of the way. And now set those next meetings up that are more likely to close because it's a sales-qualified lead. Right? That's something we talk about. **If we could get a sales-qualified lead where it looks like it's aligned with us, and align with what they need now, then they're pulling instead of us pushing. Now we have a much higher likelihood of that closing.**

*SS: So we are looking at a better sieve at the top. A better qualifying process so that we can convert it into a pipe and not a funnel. Right? So, what, according to you, are ways to do that better. Is it about defining the prospect better? I mean, like the ICP, is that the thing, or is it having an early chat with a complete disclosure that look, this is what we solve best, and we believe that you have this problem?*

*But do tell us whether you really have this problem, because if you don't, then this discussion is not necessary, and we don't want to waste your time. So, what do you say is a good way to do this filtering, this sifting through the pile to find the ones which should go into the pipeline legitimately? How do you do that?*

**AF:** Yeah. I think that the first thing is whatever leads you get or whatever system you're using, make sure that it is giving you things that are aligned with where your strategy and your goal is. Now, once you get them, it's important for the SDRs, the BDRs to try to understand, doing a little bit of homework, on who is that person. I'm not talking about extensive research because, of course, they're making call after call after call. But what is their job title? What industry are they in? Where have I seen something like this before, so that I can start by offering them — hey, when I've worked with others like you, I have heard them say the following things, does that sound like where you're at and we're not necessarily putting words in their mouth. **What we're doing is we are both sitting there looking at a third party, and it's often easier for people to talk about a third party, than talk about themselves.** So, if we've done just that little bit of homework on the mindset around what are they going through, then I can talk with them, without asking them— are you doing this? Is this something you're doing? Because people could become de-

fensive right? Now, how do we know which things we should be saying about the third party? It goes back to what does a well-qualified prospect look like for us? What are the things that would be aligned with where we want to go? So we say— for others, these are their struggles. This is what they're trying to do. This is what they would like if they had a magic wand. Here's the things they would like, how does that sound? How does that compare to your situation? And in at that point, we can start to have a discussion. They could say, hey, my challenge sounds exactly the same, but I'm looking at solving it a little bit differently. And they may even ask, is that something you can help me with? Because we've just told them we've worked with others like them. So, we bring credibility and the ability to have the discussion all the way up to the front of the sales process. **We should be thinking about the final part of the sales process— to close and also beyond that— what will success look like for them.**

What is it going to be that constitutes value that they will realize, and what we can work into at the beginning because it's all about value, right? And what we want to get to is, okay, you've said that this is where you're at, this is what you're looking for. That sounds like something we can help with. So that's to your point— the sieve. These are the benefits that have come from it. Now, how does that compare to your expectations? What does that look like in terms of the value or the benefits you are expecting?

So right up front, we get them talking about it. This will weed out people who are just curious about technology, who call us up to find out whatever, or as we like to classify as, column fodder— just being another company that they're calling to get a quote to see if they could lower somebody else's quote. **So, we can find that out upfront by finding the type of value and the goals that they have in mind. So those are some of the things that I think that can get us necking down the process right at the very beginning.**

*SS: Right. So, the last question before I let you go, is about what stage the buyer is in. When we are prospecting, we are going after some defined intent that is available to us through some research, whether it's intent data or through the calling, through qualification process, and*

*so on. Which means the buyer is pretty much into the decision-making process. So typically, they're like 60 - 70% down the road.*

*And that may be pretty late, because they would have already been talking to some vendors that they think would be able to solve their problem. Unless you have a completely unique new product, which does not exist, which is rare. So, how do we tap into the buying process earlier and get into the discussions earlier? How can we get in early into the conversations that they're possibly having internally, which is at the level of change management. How do we do that?*

**AF:** Yeah. And part of it is, they don't know what they don't know sometimes as well. So, they may be part way or a long way down the path and going on a certain track and may not be aware of what the possibilities are. So, one thing to do is whether they are at the very beginning or they're already down, the idea of telling them what others like them, in our experience, are going through, is the way to find out how far they are along the path. And in fact, if we've done it correctly, we should be able to plant some ideas— not ideas about our product, but ideas about what the possibilities are and what some of the things are that they should be looking at.

One suggestion is that you have a list of typically asked questions on your website, that they should be asking anybody from whom they're seeking out your solution. So here are the things that you should ask anybody. And I myself, I do a lot of things around webinar mastery, and I have kind of a consumer guide to webinars and doing things virtually, that poses a bunch of questions around thinking about things that a lot of people aren't even aware of. Because mostly they use something like this environment, and they're mainly just throwing their slides up there.

**But if we can provide some ideas to them upfront through the website— here's the things to ask. Here's the things to think about.** I

think that the traditional lunch and learn sessions that we used to do in person are a good thing to do. However, don't make it about you. Help, people who are in the search, and you might even put it out as, hey, if you are thinking about this type of solution, here are some ideas for you to consider. And once again, I would suggest using this idea of vision generation that we utilize where others, like you have said they're doing this.

One thing that approach does is— everybody knows about FOMO, right, the fear of missing out? When we start talking about what others are doing and give them ideas they haven't thought of, it's like— ooh, others are doing that? Then I should probably be doing that, too. And neither will confirm where they're at in their analysis. And they go— okay, I'm on track, and there's somebody that can help me, or, oh, my gosh, I'm this far down, and I hadn't thought about that! I better go seek them out and see what it is that they can do. **So, the idea that people don't know what they don't know, I think, is very powerful.**

And certainly, if it gets all the way to the point where you're into an RFQ, RFP situation as we know, that means it's almost a done deal because we didn't get to influence it. So, whatever we can do to influence those things through our partners, through existing relationships and through social selling. **So, this is why social selling is so prevalent, to get those insights and be able to find out what we can do to position things a little bit differently for our customers, so that they can come to us.** Or if we're engaged with them, we can give them something of value, or we can decide it's not a good fit, and we graciously let them go.

And by the way, one thing that I found interesting is, sometimes when you graciously let them go, they start to realize how serious you are, and they may even come back and say— well, actually, we really do want to talk to you. Because they may go and do their homework and figure out what you were telling them was actually pretty good stuff.

*SS: And it's also a great way to build trust, right? When you can tell a customer or a prospect that you don't think you can help them or that this is not an exact fit for them, and they are better off with something else. You have actually elevated yourself in the trust quotient in their eyes.*

**AF:** That's what made a name for Macy's back in the day. If they didn't have the product, they would recommend somebody else. And yet their business grew and grew. Also, by the way, if it doesn't fit with me, why would I want to struggle to make it work? Let somebody else take it, especially if it's business I don't really want to do. I'd rather give it to my competitor, and then they can be busy doing that other stuff while I stick to what my main focus is.

*SS: Absolutely Art. This was a very enlightening and educative conversation, and I hope that folks who are listening to this are making notes. Obviously, by no means, does this close the discussion, but I think it's a good point to leave it for the next one.*



## Art Fromm

President and Founder, Team Sales Development Inc

<https://www.linkedin.com/in/artfromm/>

### How did we get here?

- In the traditional model, to get more conversions, you must put more into the top of the funnel.
- But it's very inefficient and leads to misappropriation of resources.
- Too much effort, time, and investment is put into leads that don't convert.
- Buyers don't want to be confronted— they want to be helped.
- When sales makes calls they do not know enough about the buyer or their problems.
- They rattle off their product features and benefits without understanding the customers' challenges.

## What is the solution?

- The funnel should only be right at the top, and then develop into a pipeline of “most likely to close.”
- The strategy should be to go after the best fit.
- Overcoming the challenge of knowing the buyer requires Discovery.
- Generate a vision for the buyer, do not talk about yourself or your product first.
- Describe a scenario where you solved a problem for another similar customer, in the same position.
- Your website should be about your customer stories, not about you or your products.
- Your website must plant ideas that help the customer discover their own challenges.
- Make sure that qualified leads are aligned with your strategy and your goal.
- If not, it is better to let your competitor go after that customer.
- The deal does not close with the sale— it goes beyond that, into customer success.



# PATTI POKORCHAK



Patti Pokorchak is the Founder of Small Biz Sales Coach, MBA. A serial entrepreneur since 1992, she helped co-found and run a software business, now in its 30th year before opening up her own hobby farm and garden center, making it a thriving destination.

Patti is the author of *The Accidental Farmer: Adventures of a Serial Entrepreneur*. She believes if she can be a farmer, you can be anything you want to be, as long as you know how to sell and market.

*Subhanjan(SS): Patti, welcome to the 5% conundrum as a part of the Extraordinary Outcomes show. I'm really delighted to have you here. Before we get to the main question, why don't you tell us a bit about yourself and your background and experience in sales.*

**Patti Pokorchak (PP):** Well, I'm Patti Pokorchak, small business coach out of Toronto, Canada. I do have clients around the world because Zoom and Skype makes that possible. I was actually a tech pioneer. I was the shyest, most insecure geek you've ever seen. But IBM hired me after my MBA in marketing. IBM hired me, forced me to learn how to sell. I made a lot of money at a very young age, and that allowed me to quit IBM and start traveling the world. I ended up in Europe for nine years. That was the beginning of the PC era, and because of my IBM background in tech, I was hired to do sales. **Once I learned how to make sales my own, instead of that cookie cutter approach, I started treating people as people. And because I was an introvert, my secret sauce is to be curious and caring.** And that's not quite rocket science, is it? And introverts, they like to ask questions. They actually listen to the answers and then say as little as possible. And that has been my secret to success.

I am insanely curious about people. You know, we're going to be talking about that 5% conversion rate, which is abysmal. And it's all about the quality of questions you ask up front. You know, it really is. One thing I've learned is you probably can't ask too many questions at the beginning of your conversation. I find what I call a lot of sales professionals, they do premature closing. They sort of see an opportunity, they go, oh, OK, let's go for that. And I say no—patience. Keep uncovering because that might be just a tiny little pebble in the shoe. But there's an elephant in the room that you're missing, and that's the real payback. And that's where the real conversion comes, you know.

*SS: Right. You have already picked up on the topic. Would you agree*

*that today the lead to conversion is around that 5%? I mean, it's a low single digit.*

**PP:** I would agree with that— for sales professionals, definitely. It's a little different when it's a solopreneur. When they go out, they convert higher, but they're literally waiting for the phone to ring, and it doesn't ring very often. So, the conversion is higher, but it only rings once a month or so.

**SS:** *So that's a very important point, because in that scenario, I believe there is a ready customer who doesn't need convincing. He just needs that service. It's like, I have a flat tire— I need somebody to fix my tire. The first guy comes around and says, I can do it, so he will get the job, right? But not in a scenario where it's a new solution or a new technology or new source materials and so on, where multiple people are involved.*

*Most of us are in commodity business. We are selling the same thing. If you have a unique thing— I sell moondust, maybe you can do whatever you want and people will come to your doorstep. Right? So now that you agree that the number is correct, how do we fix this?*

**PP:** **Training. First of all, the majority of sales professionals don't have a lot of training,** you know, they're given like, a one-day product focus. They're actually not given a lot of sales training. One of my life legacies is to make sales a respected profession. I now teach at my alma mater, which is in the business school at Ryerson University, but it is only the entrepreneurship faculty. Marketing still hold their nose and go, "Oh, please- we do a theory course on effective persuasion. That's all we need to do." **They don't actually teach marketers how to sell.** And because I say learning how to sell is not a spectator sport— so, I've refused to be on a panel to spout out what a great salesperson I am, because you don't learn anything from that. You— salesperson out there, you've actually got to say the words, you have to stumble over it. So roleplaying is huge.

So, we moved away from the managerial philosophy of "you have to go out and sell— here's your quota." Bang, bang, bang, lots of pressure— so how can I help you get your quota in a way that's not pressured? I actually have a sign right over here. It says, "Relax", because I need to be

relaxed. Right? So, if I'm under pressure, I am going to really just go for the—I don't know, I hate the violence—but go for the kill.

Here's a live prospect. I've got to close you. And it just creates unnecessary tension. So, even as an insecure, nervous sales pro, 40 years ago I needed to relax. Because I'm going to make you more afraid of me than I am of you. OK, so I got to make sure you're relaxed and comfortable with me.

Remember, some things haven't changed. **People buy from people they know, like and trust.** You've got to know me. You've got to like me. You've got to trust me. You're not going to buy until you trust me. So that's why we have to establish—**I call it your BBF— your best business friend.** And if I approach you in that relaxed tone, if you were my new best friend I met at a party, I'd be curious. I'd be asking you questions. I like to treat my clients as not my best friends, but my business friends. You could come in. I can ask what would you do in the weekend? How's your wife? How're the kids? You know. Really care about people, you know, not just business.

*SS: Right. So let's dwell a little bit on that trust bit. At the end of the day, you know, in this global scenario where you are literally meeting me — I'm on the other side of the world. And many a times you'll have a customer who is on the other side of the world or very far off, and you are extremely unlikely to meet with that person. How do you build trust?*

**PP:** Well, that's where social media comes in, and again, it's a long game, you know, getting social proof—which is your LinkedIn online resume, having current recommendations from past clients, past colleagues, past bosses. You know, I get very suspicious—people who have 15000 followers, and their last recommendation is ten years old. Like I you know, I'm not from Missouri, but I am skeptical. So, I look for the red flags where something's out of sync. You know, you haven't got the 99 plus endorsements for your key skill. I was a headhunter at Executive Search Partners, so I learned, I was trained how to look at profiles. So social proof is important. Your website, obviously. I'm seeing that you're a content provider—like both of us are on the Sales Expert Channel. To be acknowledged as a sales expert gives you that certain bit of respect-

ability.

*SS: So, let's focus on your focus area, that is small business. What are the problems you see, besides this, as a business? Besides the salesperson problem, what about the leadership, who is running the business? So, what is your analysis of why small businesses are converting so little, and how can they do better?*

PP: You know, one thing that hasn't changed is that **a lot of sales professionals are still really feature oriented. They go, hey, we built the better mousetrap, come, and get it. And it's like it doesn't work that way.** If they don't know their industry, they don't know their competition, they don't know the benefits. They don't have the stories to tell about who they've helped.

**People buy value, the results, and outcomes.** They don't know that. And it's really hard to get through that. **You don't need to know that you have so much horsepower, so much torque, so much megahertz or whatever. Nobody cares. Will it go faster?** Can you help me do my job faster and better? I want to know that and know that somebody else uses it— tell me a story because stories sell. So, I want to know.

I spent ten years selling barcode systems. Oh my God, poke my eyes out, you know, but we branded it.

I came up with an off the shelf program called Barcode Bassets for Barcode Asset Tracking. Branded it really well. We even had a birthday party for this imaginary dog. We sold millions around the world. 25 countries made barcodes acceptable and approachable. I guess that if you can make selling barcodes interesting and tell the stories about it, then you can make anything interesting. If you're selling HVAC— ventilation systems where you can tell stories about the disasters and how you helped somebody out of a disaster, you tell the heroic journey. So, you just need to really be passionately in love with what you do. Don't do it for the money for sure, you know, and be all encompassing. That was because I was shy and I didn't like to talk, but I knew my stuff. I knew everything about it.

When I became a farmer, for example, I knew nothing about farming. I was a beginner gardener and for two years all I did was read gardening books and talk and talk. I asked questions of my customers. So where

are you going to plant that one? How does that one grow? And just being curious again. And sure enough, I became an expert gardener. So it's all about really loving the industry you're in, understanding it. And to know that the more you know, the better, the more you will sell. Because if you can start telling stories about the industry and I know your pain, I become the trusted advisor— that's where you want to get at, you know.

*SS: So, Patti, from your experience of the last seven years of being directly hands-on in sales training - what are the biggest problems that small businesses have today in terms of revenue?*

**PP:** It's adapting to a moving target, too. It's like, Oh my God, we're staying at home. This has never happened before. And sort of everything kind of shut down because we were in a state of shock. So, we have to be able to pivot and see the what's our next opportunity? When I had the bar code companies, we were in a government town, Ottawa, Canada's capital. There's two industries, government, and tech. And when tech was high, we sold to them. When government was laying off, we went to tech, you know. When government was booming, we went there. So, it was a balance. **You cannot rely on just one market. I call it the marketing effort. You got to focus. Pick a target, pick a couple, where you have fun dealing with, where you add the most value.** I call it the domino effect. Once I realized where I could sell my products, the right industry, the right job title, it was dominoes. Because once you know your value and if you don't want to deal with me, not my problem, you know, it's your loss. It's my inside voice.

*SS: Yeah, great. So, the final question is, how do you see the end customer, which is the customer of your customers— how do you see them evolving over the last, say, 7-8years, how have they changed?*

**PP:** Oh, **we've changed from having like a sales funnel.** I mean, you still need your sales process. You have to adapt to their buying journey. OK, they are way more educated. They've already done their research. If they're reaching out to you, you've got a one in three chance of blowing it or maybe 50— they've chosen a short list. It is up to you to show your differentiation, your value.

You know, **the conversion rate should be really above 50%, if not**

**more.** Because it is up to you to show your value, ask the right questions. Where are you in the buying journey? What are your key priorities in making this decision? Who else is in it? It's asking the better questions, the deeper questions which shows that you know your industry, you know your products, you know the buying journey of where it goes. Who else is impacting this journey? Who do I need to present to? Who do I need to impress, you know, so it can happen?

*SS: Yeah, sure. So, do you have a story of a customer's customer, how you helped one of your small businesses actually nail this and convert a difficult scenario?*

**PP:** Yeah, I remember, this is one of my favorite stories, too. I took on a small business, and they'd invested a lot of money into different sales experts, people that I know and revere. And then they got me. And I have a bit of a twist. And they had worked on a client and it was a VP level, and he moved and became a president at another company. And they went— "well, there goes our opportunity." And I was just like, "No, no now you've got two opportunities." You're now talking to the president who loves you. He's one opportunity. And, of course, he's been replaced. But you still have that opportunity. It's your chance to get in and say, hey, we've been working on this. Why don't you take on this project? So, they all of a sudden, they had two hot leads and they actually closed three deals, what they thought were lost deals by picking up the pieces. I would say **especially entrepreneurs, they fall down in the follow up and more salespersons do as well — is they feel like they're being pushy or intrusive.** And it's just like, no, they're ghosting you. It's just that now's not the right time. So never give up. Just, you know, elongate your follow up. So, if you do it every week, then do it every two weeks and every month, just stay in front, but always add value to that person. "Oh by the way, we just did this solution for this company, that's just like you. Want to talk about it?" If not, OK, well, try again next week or next month. "I just noticed your company did this,"— the trigger event— stay in front, stay top of mind and eventually reach the goal six months later. "OK, I'm ready to talk," you know, so I guess what I'm saying is, don't give up too early.

Like I said, last year, we went into the lockdown, and everything just

froze. And I had a client who froze and said, no, we can't go out and prospect. I said, yes, you can. Life goes on, you know, life goes on. Persistence is a wonderful thing. And I always had that trait— Persistent Patti. It is this just like Columbo, you know, the old detective. "One last question." You don't know when the NO might turn to a maybe.

*SS: Yes, of course. If you didn't ask, you don't know.*

**PP:** That's right. Exactly. **It's about asking, and just go maybe kill the sales processes that you pin your hopes on.** I always say I don't want to waste your time, I don't want to waste my time. If it's never going to be, let me know and I will not bug you, you know.

*SS: Sure. Wonderful Patti, thank you so much. This was great— chatting with you today. And I hope that you had. And I would love to stay in touch with you and talk more.*

**PP:** Yes, for sure, that's great. Good luck with your channel and thank you for a delightful interview. I love talking sales because it's a never-ending topic. So good luck to everyone there. Thank you, Subhanjan.





## Patti Pokorchak

Small Business Sales Coach

<https://www.linkedin.com/in/pattipokorchak/>

### How did we get here?

- The majority of sales professionals don't have adequate training.
- A one-day product focus does not equip them to sell in the B2B environment.
- Many sales professionals are feature oriented, but the customer doesn't want features— they want results.
- Salespersons are taking a cookie cutter approach.
- They don't know their industry, or their competition.
- They don't have the stories to tell about who they've helped.
- Salespeople are unable to articulate value and differentiation.
- Pressures of trying to reach quota are compounding problems, because it is hard to sell under duress.

## What is the solution?

- Treat people as people— be curious and caring.
- Ask better, deeper questions that help the buyers discover their own challenges.
- Listen to the answers and then say as little as possible.
- People buy value, results, and outcomes— so don't try to sell horsepower or torque.
- Focus your marketing effort— choose one or two targets.
- People buy from people they know, like and trust, so establish trust and become the buyer's BBF, best business friend.
- Get social proof— through LinkedIn resume, and current recommendations from clients.
- You must go out and actually say the words, play the role.
- Be passionately in love with what you do— don't do it for the money for sure.

# BRAD JEAVONS



Brad Jeavons is an organisation improvement leader whose purpose is creating a better future economically, socially and environmentally for generations to come. Brad helps organisations directly define and achieve excellence journeys. He works with organisations across

many differing fields – education, manufacturing, mining, agriculture, supply chain, technology, government and health.

Brad is a Agile Scrum@Scale Practitioner and Lean Six Sigma Black Belt. He is an associate with SA Partners, the assessors for the Shingo Model, the most prestigious business award for Excellence in the Western world.

Brad is the host of the Enterprise Excellence Podcast and an award-winning author. His recent book *Agile Sales*, outlines how to apply agile to sales and marketing to amplify customer experience and business performance.

*Subhanjan(SS): Brad, welcome to the show. I'm delighted to have you here. We're going to talk about the elephant in the room in B2B sales—the abysmally low rate of conversion. But before we get there, please do tell us a bit about yourself, and also about the book you wrote.*

**Brad Jeavons(BJ):** Thank you so much, Subhanjan. Well, I grew up on a farm in inland Australia and got involved with sales there. You know, you had to do everything as a farmer in Australia. And then I went to university. I was lucky to go to university. I studied international business, focused on Japan and learnt a lot about Toyota. And then I thought- OK, I'll go on to operations.

But I ended up in a graduate position and they put me in sales. You know, one of those jobs where they start to move you around a company? And sales just stuck with me. It was good. And so, I had a great career selling, for probably over 20 years, because even when I became general manager of that organization, I was still out on the frontline and spending time with customers and with my salespeople. And then I became a consultant in business improvement.

When I got to that senior level, I was also managing operations, and I brought back the passion of what I learnt from Toyota and other studies I had done. Now I'm also a consultant and an author. I wrote the book

“Agile Sales”. The reason I wrote the book, “Agile Sales”, is because **most books in sales have been written about techniques and different selling approaches— but that’s only part of the story. “Agile Sales” really goes into the cultural and the systems elements, the customer centricity and alignment elements,** which really, I don’t think many books have done in the past. And that’s why I wrote the book.

*SS: Wonderful. So, let’s dive right in. The conversion data that we get to see varies from 1.8% to 7.8%, depending on the industry, vertical or the geography. That’s the conversion rate from lead to close in B2B sales. How do you think we got here?*

**BJ: Subhanjan, there’s three things I’d say that have led to it, in my view. Number one is technology. Another one is the management system we have used for sales, and lastly it is our leadership approach that has contributed to this.** These are the three elements that I believe have contributed to this poor conversion rate. And I might just start with the first one, Subhanjan, which I think is the one that everyone knows— **traditional sales, and a lot of salespeople I come across, are still selling based on the narrative of “I can get you this product— it’s got these great features and benefits that will help you with your needs. And here’s the price”.**

The problem is— a customer can get all that information through a website— and more, now. And they can do that research before they even engage with a salesperson. So, **the traditional sales approach is pretty well dead because by the time I turn up to a customer, the customer has already done their research and probably knows the product a fair bit.** It’s just down to price—because a customer will always find a point of difference to buy on, and if they’ve ruled out every other point of difference, they’re going to bring it down to price.

I think that’s just a demoralizing conversion rate, right? Competition is massive because salespeople are selling against websites and amazing marketing engines. And that’s one part. Technology. We could basically lay down the amazing marketing departments and IT departments nowadays. That’s one part that’s I think defunct—the salesperson.

The other part is our traditional management system. The traditional

management system in sales has been very much about measuring, rewarding, recognizing, driving the individual. And it has been largely results based, focused on like, measures, “You know your job’s to get sales, go get sales. Why aren’t you getting sales? You need to go get sales, get out there and get sales, make more calls, do whatever you’ve got to do.” And I think that pure **management approach of really just driving the result and driving the individual, I think it’s reduced the amount of innovation that can happen within the sales departments. Because it’s people coming together and working as a team that actually leads to innovation and great things.**

Whenever people are out there by themselves in a stressful role, being pushed and pushed and pushed, they don’t think clearly. And they just go from day to day, and it doesn’t create innovation. The third thing I’d say is our leadership approach in sales. It hasn’t been focused on coaching as much as it should have. I see a lot of sales leaders where they’re basically purely managing the individual. They’re not actually leading the team to help the team grow and improve and evolve, and also leading the team to really place themselves in their customers shoes and understand what’s changing with their customer, and strategically look at the market and think what’s happening and evolve.

So I’d probably say that **there’s not a culture of continuous improvement in sales. Because of the management and leadership approaches.** So three things. One is changing technology led by marketing and I.T. evolution, which we haven’t kept up with, **our management practices haven’t kept up and our leadership practices haven’t driven a culture of continuous improvement and innovation that’s required to keep up.**

*SS: Great. So let me dig a bit deeper into what you just said about technology. Then we’ll progress to management and leadership. Those two seem to be sort of joined at the hip, sort of aiding each other’s problems further. But we’ll get to that later. One of the things that you mentioned just now is that improved marketing is a problem— improved marketing aided by technology. It should be the other way around, improved marketing should be getting us better leads, which means we should be able to close better.*

*So where is the disconnect?*

**BJ:** I think it's that **marketing teams have become highly focused on their web funnels and their automated funnels for driving sales. I see a lot of marketing departments where they don't really see themselves nowadays as lead generators for salespeople.** They see themselves as lead generators for Web funnels to drive business through online transactions. And so a lot of their innovation and experiential work for the customer is done based on how do we bring them in, educate them, get them into the web funnel and drive them through the website for sale. I find a lot of marketing departments that traditionally did do work for sales teams, don't do so much anymore. **It's shifted more to the website and partly because of costing you know, it's partly because it's a lot cheaper for a company to do that.** But it's also that a lot of sales teams haven't evolved to continue down the path of being a value-add consultant who can actually deliver great outcomes for the customers.

OK, I could generate leads to send into a sales team where they're largely just selling product and price and supply. And it would cost me a lot of money and cars and phones and all that. Or actually, I could do that same thing and just channel them into a website and get the same outcome. Wow. Let's put our money into the website because that doesn't require labor. And so let's go that way. And I think the sales teams that are selling on that traditional product and price and feature and benefit type of approach, they're becoming sort of obsolete. I think that's what's happening.

*SS: That's interesting, because, especially because you are speaking to me from the country of Atlassian, which really put this out in the world that, hey, I can do with a 12% spend in sales and marketing and not 60% spend like the other guys and so on. So I see where you are coming from. And this will be broadly correct for SAAS products—also where you're going to see the global movement towards product-led growth. For non-SAAS products you really can't complete a transaction on the Web, and you still need a sales person. It has to be a certain size of purchase then only the question of a person being involved is justified. I understand that. To your mind, where is the disconnect when a salesperson is required? Even in a complex software sale, it is*

*required. See if you are buying an ERP or a logistics software or what have you, I think still a salesperson along with multiple people from the vendor side will be required. But where is that disconnect in non-software product?*

**BJ:** I work with a number of companies that are automation and software companies. And yes, they do need to deploy salespeople, but it depends how far down the buying cycle is the customer already before they engage that salesperson. And that's a big ticket there. Okay, yes—you need to engage a salesperson to finalize things off and to make sure that the handover to projects go well or delivery team goes well. But **if that salesperson isn't taking a customer aligned approach, which is really focused on delivering extra value and high value experience, they are going to be drawn in at the back end of the buying cycle where we are getting down to basically signing the deal and they're going to get squeezed for money.** And they're also potentially have their win rates going to go down. Because there's going to be more competition there because invariably the customer knows who the players all are. And if you don't show me something different, that is truly different, at what you do and how your company operates, you know, I'm going to base my decision largely on price or on the research I've already done myself.

***SS:** Absolutely. So there is this counter thought that salespeople need to be experts and need to educate the customer. How far is that really going to pan out? Because I always question myself, no matter how good I am with my subject and my industry, as a salesperson, the fact is that I'm one person and my potential prospective buyer has access to all my other expert sales competitors and also consultants and the Internet. So for me to assume that I'll be able to shine a light in a corner that the buyer has not already seen—it's quite presumptuous, isn't it?*

**BJ:** I think Subhanjan, the answer to me comes back to something you said to me earlier, like, I'm going to get you on my podcast to talk about focus on the buying journey. And I want to tell a brief story on this one, if I can. I had a team of young 21, 22-year-olds at a uni. They weren't technical experts, but there were some elements at play there with them that they had 85% conversion rates and double growth every year. Amazing. I'll come back to that and explain that later on.



But then I also took over and bought a company and we took over a team of technical experts, and these guys knew the technology inside out. They were amazing. And, but their conversion rate was only about 30 to 35%. Now, during this time, the attitude was, we need to hire experts, you know, they need to be technically great and that's who we need to hire. And what the company was doing was hiring really driven, individualistic people that they could put a commission on and drive them like crazy. And you didn't have any teamwork.

The selling process was more focused on technical expertise rather than the buyer's journey. And at this time, we hired a young lady. She would have only been 22, 23. I don't think the age matters, but she was in a more junior role, and she stepped in to sell automation— her name was Katie. I write about her in the book. And with Katie, I would mentor her on some new approaches we were taking. And I said to her, Katie, **it's not about the technology. It's about the buyer's journey, the customer's journey. These are factory managers. And I said, well, what's happening in the world of these factory managers?** And in Australia back then and still now, they were fighting for survival. You know, it's like everything was going offshore.

They've got to survive. And I said to Katie, how are they trying to survive? OK, they're trying to deploy lean Six Sigma practices into their factories to try and improve. They are trying to get good at root cause analysis and these techniques. OK, and then, Katie, what do they want out of you? So they would want me to be able to help them actually improve their factory and actually make their factory run better and be more competitive. OK, so let's do that. How can we build an approach with our customers— let's call them 'Bob'. Bob was the owner or the factory manager. How can we build an approach for Bob that he's going to have an amazing experience? Because we're going to be able to demonstrate that we understand his world and we know where he's at. And we have an approach that aligns to lean Six Sigma techniques and root cause analysis and all those things that he's so passionate about right now.

And then at the end of the day, we're going to be able to demonstrate facts and figures and data that shows the returns and gains we're going to get. And he's going to feel really comfortable. And hey, if he's not,

we're going to pilot it demonstrate it. And so Katie— in the first year of any new salesperson, they normally only sell about seven or eight hundred thousand dollars' worth of gear. Their conversion rate was normally about 30%, you know, because you're learning the technology. Katie in that first year sold about 1.5 to 1.6 million dollars' worth of equipment and her conversion rate was up around 70% or 75%. And by the end of the year, she hardly knew how to turn a coder on automation. She probably didn't even know how to switch the thing on. But she had the subject matter experts around her, who worked tightly as a team with Katie because they were all driven to achieve the same thing. They're all part of the same team, the technical experts who are installing the gear and looking after the gear. They just backed her as a unit, and they worked together towards a common goal to run this process. And there's some amazing stories in it.

*SS: Great story. And that points towards our current incentive programs that we have, which is incentivizing individuals. Maybe it's time to take a serious look at how we incentivize and how we thereby drive end results that we desire as an organization. This is a good point, too, actually to segue the discussion to the solution. So how do we get out of this, you know, abyss of low returns on our selling time.*

**BJ:** It's amazing when you do it too. Such a pleasure because the results you get are so great. There's a lot of techniques that I have written about in the book "Agile Sales". But I want to start with one that's really important. **Everything in Agile is about the customer. So the first thing is you've got to place yourself in your customers shoes.**

You've got to know who your ideal customers are now, and who are the people in there, the personas that are going to buy from you. So that's the first thing. And you've got to get deep into their world. You've got to know their conscious value side, but also that unconscious emotional side, both at work and away from work. **There are some cool techniques you can use to do persona mapping, empathy mapping**— things like that. And then, of course, you need to do what we did with Katie, which was to really think about, well, how do we align to the buying journey and then take a sales framework that really bolts into that.

But the next thing that I haven't mentioned that's very important, is we

need to **form our teams, not based on silos and divisions in our company, but we need to form small teams based on how the customer needs to get great outcomes.** So I hinted at it with Katie, but the team that worked very well together back in that year, I can't remember what year it was—it was in Victoria—it wasn't just salespeople.

Katie was the salesperson. Anthony was the head of service. Shaji was the technical expert. She also had Megan working from a software point of view. And then there was also Arvi, who was another specialist there at the same time. So really out of it you had one salesperson, one more account management person, and three technical people working as a team, not a team of salespeople. Because who did Bob need to really get right outcomes from? It wasn't just salespeople. He needed that technical capability, that expert and expertise in lean Six Sigma. So they formed the team and they were measured and recognized, and they supported each other to work as a team within that target market. So that's two key parts, if you can just do that. And of course, **measures drive behaviors and recognition draws behaviors. So how you measure people, how you recognize people, will basically get you the result.**

I mean, in Agile coming out of the IT world and a lot of other places now, they physically put these different skill sets into the team. If you think of it, actually a great example of this is our special forces around the world. You know, you've got our big military forces where everyone is split into their role, but then you've got these **elite teams where a five-person team will include, you know, all the different capabilities, like the medic,** you know, in there in that one unit.

Why? It's because it **can be extremely agile and fast when they're in the field. Also, because they can train each other, cross-train each other and start to skill each other up.** There are all these benefits. But I don't think you have to necessarily go "Right—you guys are the team. Off you go." You can do it informally through cultural aspects. If people are in the same community together. But in true Agile, you'd really align them all.

You'd create the team to suit the customer. And in some cases, the salesperson can have all the knowledge. So in that case, a team of salespeople is all you need. If they're able to get out there and do everything in them-

selves and move fast, that works well.

*SS: And it also brings to mind the fact that the sale really doesn't close with the PO being signed. The sale really closes when you have delivered the outcome that the customer is looking for. That's when you create a long-term relationship with the customer, and then you can continue to service that customer. You build the trust. It takes time. We can't build trust overnight. Just because I've met you or you have met me or we have exchanged some notes, doesn't mean you will start trusting me. So I think elite teams are a very good example of effective selling. It's great if the delivery team, what we call in software "customer success teams", are part of the selling team, just like how the marketing person should also be part of the selling team. That's where all the silos get created, when they don't talk to each other.*

*Now, I have made a sale. I have collected my commission. I'm out of the door. I don't really care what happens to that customer who paid me or my company. That's a strange place to be, because if you have no stake at all in the delivery of what you are selling, then I think that's a problem.*

**BJ:** Yeah. And you lose repeat business. Why? Because that customer has a bad experience with the delivery and typically the sales team blames the delivery team. The delivery team blames the sales team because I didn't give them enough information or they sold something that was impossible. And then what happens is the customer has a bad experience and they never buy from the company again. And that's another indicator of conversion rates because, they probably would get that company back in again to get another quote. But there's no way they're going to buy from you. Your conversion rates just dropped another notch.

*SS: Not only that, Brad, I must also tell you that I talk to a lot of buyers for the podcasts that I do. Buyers have informal peer groups, where they're talking to each other, and they're constantly feeding information to each other. So if you think that I have done a bad job of implementation with one customer, I am only losing that customer; you're living in a fool's paradise. You are losing five other deals, which you just don't know about right now.*

**BJ:** Yeah, that's it. Word gets around and the industries are small, and people move. And that's the outcome of it. So really, culturally, we need to be a unit. But it's about the systems that we drive into a company, the way that we structure ourselves, the way that we measure our people, the way that we meet, where these cross-department teams don't meet because they're often just running their own meetings with their leaders.

So that's the other part. There are three key aspects of Agile. So if you get your team right and it's aligned to the customer and we're starting to measure and sweat the right things, that we're a unit, and we're doing things to build team culture—it all comes back then to **Transparency, Inspection, Adaption.** So if the measures and performance we're driving for, are visual and transparent—and CRM's and software is nowadays are so powerful for this, you know, it's live, we can see it—but the thing is, it's up to that whole unit of five cross-functional team members, if it is cross-functional, to really be sweating that.

Typically, people in Agile or Scrum will meet for, you know, five to 10 minutes a day or at least a week. And there's a whole technique to that. But what **they're ultimately doing is they're inspecting the measures and the progress of deals and, you know, improving activities they're doing as a team to make better outcomes for customers.** And then based on what they're seeing, they're adapting to it. And, if that unit of people in that team have got the systems and measures and structure to drive the right behavior; and they're being led the right way, where we're actually leading them with a coaching approach—just like a coach of a cricket team would do, where he or she is really ultimately sweating that team becoming great and winning the IPL—you know, that's the approach. And I've just found the work done through IT with Agile has been amazing. And it's slots so well into sales.

**SS:** *Right. Before we wrap this up, I have one question. You know, in all this discussion that we are having, we have not touched upon the fact that most of the time when we are identifying leads and pitching to them, we do not consider the buyer's journey. A lot of that journey is already over because, he has collected information. He has potentially got comparative data from your website, from your competitor's website, how each of you, face off with each other and so on. There is a lot*

*of information in the public domain, and they have potentially spoken to a consultant who is an expert in the area and so on. So when you are identifying a prospect, that journey is towards the end, and you are already at a point where you have to compete with five other vendors. Because everybody else has tracked that particular account in the same way that you tracked the account. So the question is, how can you get in early into the journey, so that you can start influencing, contributing towards the process, which will thereby build a relationship so that you would be in the race.*

**BJ:** I think there is a really cool technique that I find helps with this, but the thing I'd say is that I see a lot of sales teams where we've drifted into being account managers, and we're just really going around the same accounts and staying where we're comfortable. I think **we need to get back to being out on a hunt and really about hunting in a value-add way, not in a dominant low value-add pesky way.** And the way to do that is to understand who your persona is and the market you're going after, and who the decision makers are, and really put yourself in their shoes. There's a technique called **Customer Journey Mapping**, and this is typically the technique I use to help teams form up. How are we going to go about this? So Customer Journey Mapping is where the team is placing themselves in the customer's shoes, and they're **mapping the buyer's journey from what they call discovery, through to research, through the purchase, through to delivery and through to devotion.** So let me just explain this. With discovery you're actually mapping what are these personas we're targeting. Like Bob back in the day in my previous company. What are these factory managers doing, day in, day out? How do we help them discover us with value, and much before they're even thinking of buying a new software or before they're even thinking of going into automation—like that they're going to these events, they're looking at this feed of data, they're really driven by something on Lean or Six Sigma at the minute.

Then you go into the research phase. So **the key with the research phase is that you've got a technique as a company where you're actually helping them discover what they need to do.** You want to be in there before they actually register it, because you want to give them those insights. This is one element where the book "Challenger Sale" was quite

good in that regard, but it's been used the wrong way because it's been used to just dominate and manhandle customers. And that's not what I'm saying. What I'm saying is, as a value add, delightful way that you can engage with this customer and take them on a journey that's aligned with the ultimate journey that they want to go through. And through that you're helping them discover— wow, that is a big problem. And wow, that would help me achieve my goals and wow, that would help me overcome that. And wow, you can help me through a process here. Cool. Let's do that.

And all of a sudden, in a way, they are on this conveyor belt of the buying journey. And the trick to the salesperson then is to keep that conveyor belt moving so that you have aligned your sales process to the ultimate buying journey that the customer wants to go on. **It's a process that helps customers really discover the need, not you come in when they've already discovered the need and the real solution.** And all that happens is that, out pops an order, and then you go through the delivery process. Now, in the delivery process, as a cross-functional team, you're figuring out how do we deliver this— It's just the most amazing experience? And then you're going on to devotion. **Devotion is, how do we help them through the whole lifecycle of buying journey? What can we help them on next? What can we do after that? How do we then help them repurchase and reap?** How do we help them remove that old system and get it recycled or refurbished and bring in that new system? So devotion is you really thinking as a team— how do we build an approach and a framework to keep that customer sticky with us and only looking at us for evermore. It is an amazing technique. It allows you to look really holistically. Short answer is, you've got to help them discover you and get in there early.

If you're in there late, that's where the Challenger Sale comes in really well. That's where that book is brilliant because I'd say if you're in late and you're down the price wagon just on that path, that sort of destruction, well, that's a case where maybe you do need to challenge. You need to have something you can give an insight on or a case study or something that you can make them go, "Oh, OK, I better listen to Brad". And then you can go, "Hey, Mr. customer, let's go back down the journey a bit and let's go back through research again, because I think there's some

things I'll be able to help you uncover and get better outcomes for." And so you're trying to move them back down the buying journey so you can bring them through with value—and that's what you do if you're in late. So that's the one time that bit of power and confidence of truly challenging, I think comes in is if you're in late.

**SS:** *Yeah, I understand. And this is great. I think Challenger Sale is a great book and we also have to understand that with these books, we need to see that point in time when they came out and where the industry and the practices were at that point in time. So you cannot literally go back to something which was written long ago. There are some basic truths which are universal and will always remain valid and all that. Like trust. But what I'm saying is that, at different stages of the history, you would have books which were very relevant at that point in time. And trying to say that is as relevant today or the same techniques can work and the strategies that they were talking about will still work, could be stretching it a bit, I think.*

**BJ:** I know. Once that book came out, it was as if every salesperson who came to you in business started to throw masses of data at you and tried to challenge everything you said. And as a customer, they're going, "Well, oh, this is uncomfortable. I don't like this. Go away." I had that. I had that from all sorts of companies. And some salesperson would come in and start doing that to me. And I said, "hey, have you been reading the "Challenger Sale" book? And they'd go, "yeah, yeah, how did you know?"

**SS:** *Brad this was great— wonderful chatting with you. And I look forward to talking more. We'll figure out how and where, but it has been an absolute delight. Thank you so much for coming on the show today.*

**BJ:** Thanks Subhanjan. I really appreciate it. And I hope some sales teams and leaders have gained value because the results are outstanding—if you can tie some of these things we've spoken about together. So good luck, everyone. Thank you.





## Brad Jeavons

Principal Consultant, SA Partners Pty Ltd

<https://www.linkedin.com/in/bradjeavons/>

### How did we get here?

- Sales is not keeping up with the changing technology led by the IT evolution.
- The customer is well-informed today, so the narrative of “I have a product with great features” is no longer working.
- With the traditional approach, by the time you reach the customer, they are well down the buyer journey.
- Measuring and rewarding the individual rather than the team is lowering innovation and driving poor results.
- We lack a culture of continuous improvement in sales.
- Marketing focuses on their web funnels to drive sales, rather than generate leads for salespeople.
- Leadership has not been focusing on delivering a high value experience to customers.
- In B2B sales it is not about the technical expertise, it is about the customer’s journey.

## What is the solution?

- Place yourself in your customers shoes, and align your sales framework to the buying journey.
- Use persona mapping and empathy mapping to build your customer profile.
- Map the buyer's journey from discovery, through research, purchase, delivery and on to devotion.
- The key in the research phase is to help the customer discover what they need to do.
- Teams shouldn't be created based on divisions in our company, but on how the customer expects outcomes.
- Elite, cross-functional teams with varied capabilities can be extremely agile and customer-driven.
- Continuously measure the progress of deals and transparently encourage behaviours that lead to better customer outcomes.
- Sales teams need to get out and hunt, rather than stay in a comfort zone with existing accounts.
- To lead to Devotion you have to help customers through the whole lifecycle of buying journey, and beyond onto re-purchase.

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## *About Subhanjan*

<https://www.linkedin.com/in/subhanjansarkar/>

Subhanjan is the Founder of Pitch.Link, a Buyer-Seller Engagement SaaS, helping small and medium businesses open more qualified sales conversations.

Subhanjan hosts 3 podcasts – *The Buyer Side Chat*, *Bits About Books* and *SaaSStories* and also anchored 52 episodes of *The eXtraordinary Outcomes Show* on The Sales Experts Channel (now, The Sales Education Channel).

He is passionate about understanding the new buyer. He has appeared on numerous podcasts and on multiple shows speaking about the new buyer and how buying has changed. Previously, Subhanjan launched and hosted the first technology show on Television in India.

He authored *What I Learnt Today*, notes from his daily learnings around Sales, SaaS, and Startups.

Subhanjan holds 3 US patents and lives between Bangalore and Toronto.