How to Engage Senior-Level Decision Makers: Point of View Selling

by Jeffrey Baker and Tom Atkinson, Ph.D.

Introduction

What is the secret to gaining access to and engaging in productive dialogue with senior-level decision makers? This Research Brief reveals key insights into the minds of those sought-after buyers and what it takes to gain access to them.

Because more sales leaders are directing their teams to call higher in customer organizations and more salespeople are attempting to do so, The Forum Corporation decided to conduct research on this critical selling challenge. Based on our findings, we developed and recently released a new sales skills training capability called Point of View Selling, which teaches advanced selling practices and tools. We created this report, drawn from our full research, as a planning guide for sales leaders who want their salespeople to call higher.

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Success in selling at higher levels in customer organizations requires a different approach from the one most salespeople are using today. This is because senior-level decision makers have a very different perspective compared to that of the mid- and lower-level buyers salespeople call on more typically.

The more senior a leader is in an organization, the more that leader must focus on setting strategy and ensuring successful strategy execution. Because these leaders are primarily concerned with identifying and prioritizing which problems need solving and with assigning people and resources to tackle them, a consultative selling approach—probing for problems and offering possible solutions—will not interest them. Since these executives continually scan the horizon for new opportunities and looming threats, what does get their attention is showing them something significant they had not seen, or could not see clearly, and helping them determine whether it is worth their time to more fully investigate. The key to accessing and engaging senior-level decision makers is educating them about new, and sometimes provocative, ideas for capturing significant business value or managing serious risk. We call this “point of view selling.”

Just how open are senior-level decision makers to outsiders, particularly supplier salespeople, who seek to share a new idea with them? To answer this question we sought responses from buyers who indicated they (a) had influence over or could access budgets, and (b) had responsibilities that directly and significantly impacted their company’s profitability, from either a revenue or cost standpoint, or both. We considered these two criteria most relevant for identifying “senior-level decision makers.” As salespeople, we should be keen to talk with customers not because of their management rank but because they wield a high degree of influence in driving company results and directing company resources.

We conducted an electronic survey of a global sample of business decision makers as defined above. The 231 respondents represented a broad cross-section of industries and company sizes, ranging from under US $100 million in annual revenue to over US $1 billion. The group also reflected a range of functions (such as corporate, engineering, sales, and operations) and a range of responsibility, from frontline managers to C-level executives. The survey demographic details are presented in the Appendix.
The survey asked these decision makers which business issues they were most concerned about and how they viewed using outside resources in helping them address these issues. We wanted to understand the conditions under which they invited outsiders, such as suppliers, consultants, and academic experts, to help them with their thinking. We also wanted to understand what outside resources do that helps or hinders them in engaging senior-level decision makers and how these decision makers approach investment decisions.

The Findings in Brief

1. When looking for answers, decision makers take an “inside-out” approach.
   Decision makers rated their own expertise and experience as most helpful when tackling a business problem. They considered their direct reports as next most helpful, followed by experts in other parts of the company, customers, outside experts, and peers in other companies. They rated the input of suppliers as lowest in helpfulness.²

   **Implication:** Suppliers must work hard to demonstrate that they add value to the decision-making process and not assume that decision makers will rely on them for expertise.

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¹ A note on regional differences: The survey sample includes English-speaking respondents from six countries in North America, Europe, and Asia. The trends reported here did not vary significantly by country or region.

² Differences exceeding .12 points are statistically significant at p<.05.
2. **Decision makers value suppliers and other outside resources who know their business and industry and are easy to work with.**

We asked decision makers to consider an array of criteria for selecting outside resources to help them solve business problems. The criteria they rated as most important were “knows my industry,” “is easy to work with,” and “knows my business.” Criteria rated least important were “knowing me,” “knowing business leaders,” and “reinforcing my existing thinking.”

**Implication:** Suppliers must prove their value early on by demonstrating relevant business knowledge. While they must be viewed as easy to work with, the value they bring must go beyond managing personal relationships and “telling customers what they want to hear.”
3. **The best way to gain a customer's attention to a new idea for improving their business is to make a compelling, “live” (face-to-face or virtual) presentation.**

When we asked respondents how suppliers were able to gain their attention to a new idea, about two-thirds of responses (64 percent) referred to the medium of contact and one third to the content of the message.

Regarding the medium, more than half (53 percent) of responses indicated that a live interaction, such as a face-to-face meeting or virtual meeting, was most effective. Fewer than 20 percent thought that phone calls (18 percent), e-mail messages (17 percent), or mail (12 percent) were most effective.

![How did the supplier gain your attention? (Medium)](chart)

Regarding the message, the most common responses were that the idea needed to be compelling (41 percent), be supported by data (25 percent), promise cost savings (19 percent), and be illustrated with examples (15 percent).

![How did the supplier gain your attention? (Message)](chart)

**Implication:** While e-mail messages, phone calls, and mailings might pave the way for a first meeting with the customer, there is no substitute for a “live” meeting to gain the customer’s attention to the idea. When suppliers are able to gain an audience with their customer, they must be extremely well prepared to get their idea across in a compelling way and provide documentation and examples to support the message.
4. When considering the plausibility of an idea, most customers evaluate its benefits and drawbacks to their business, versus focusing only on cost. Respondents tended to consider ideas plausible if they were supported by examples and references (19 percent), if they showed clear benefit to their business (18 percent), if they were supported by research (14 percent), and if the idea was consistent with their thinking (13 percent). No respondents considered cost alone in evaluating plausibility.

**Implication:** Suppliers must build a solid case for their idea by showing how it adds value to the customer’s business, including both examples and stories as well as “hard data” that demonstrate the viability of the idea.
5. The most important factors for a customer to gain confidence in taking action on a new idea are evidence of effectiveness, previous experience, and support of others in their company. Respondents cited these factors most often as leading to confidence: evidence of prior results (23 percent), the customer’s previous experience (13 percent), analysis of costs versus benefits (12 percent), and the confidence of their team (10 percent).

**Implication:** In order to encourage the customer to take action on the idea, the supplier must not only build a case, but also help the customer gain buy-in from other stakeholders.
6. The most important actions to avoid in proposing a new idea to a customer are being “pushy” or too talkative, being dishonest, and failing to provide convincing evidence. When asked what behaviors by suppliers turned them off, over half of the responses related to arrogance or pushiness (30 percent) or dishonesty (21 percent), followed by lack of confidence or professionalism (12 percent), and failing to provide adequate evidence of value (12 percent).

**Implication:** Suppliers must acquire and use expertise to guide a customer’s thinking, and not confuse bravado and aggressiveness with genuine confidence. They also need to be open and honest and tell the “whole story” about the proposed idea, including its benefits and potential drawbacks.
The Four Pillars of Point of View Selling

One of the survey questions, described in finding No. 2, pertained to the criteria that customers use to select an outside resource, such as a supplier, consultant, or academic expert, to address a critical business issue. We conducted a secondary analysis of these responses in order to identify meaningful categories of criteria. The criteria fell into four categories, which we’ve dubbed the “four pillars” of point of view selling (see table below). Respondents rated each of these pillars as equally important—about 4 on a 5-point scale (see bar chart below).

<table>
<thead>
<tr>
<th>Pillar</th>
<th>Criteria</th>
<th>Note</th>
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</thead>
<tbody>
<tr>
<td>Credibility</td>
<td>• Has strong reputation</td>
<td>In order to earn the right to a first meeting with the customer, the salesperson must demonstrate credentials. Especially important are demonstrating knowledge of the customer’s business and industry. Also important are being viewed as an expert on the specific issue as well as having a strong reputation and knowing the customer’s customers. Relatively less important is knowing other business leaders.</td>
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<tr>
<td></td>
<td>• Knows business leaders</td>
<td></td>
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<tr>
<td></td>
<td>• Knows my customers</td>
<td></td>
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<tr>
<td></td>
<td>• Knows my business</td>
<td></td>
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<tr>
<td></td>
<td>• Has expertise in the specific issue</td>
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<tr>
<td></td>
<td>• Knows my industry</td>
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<tr>
<td>Analytical skills</td>
<td>• Identifies risks to my business</td>
<td>These skills are required in order to understand the customer’s situation and to develop creative solutions. They are used in doing the “homework” in preparing for customer meetings, as well as demonstrating the logic of the solution in a presentation to the customer.</td>
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<td></td>
<td>• Diagnoses the root cause</td>
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<td></td>
<td>• Presents complete solutions</td>
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<td></td>
<td>• Provides low-cost solutions</td>
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<td></td>
<td>• Calculates ROI</td>
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<tr>
<td>Teaching skills</td>
<td>• Offers new or unique insights</td>
<td>These are the core point of view selling skills, where the salesperson educates the customer and challenges his or her thinking. Particularly important are showing alternative solutions and offering unique insights.</td>
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<tr>
<td></td>
<td>• Challenges my thinking</td>
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<td></td>
<td>• Helps me evaluate solutions</td>
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</tr>
<tr>
<td></td>
<td>• Educates my colleagues and me</td>
<td></td>
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<tr>
<td></td>
<td>• Shows me alternative solutions</td>
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</tr>
<tr>
<td>Customer focus</td>
<td>• Knows me</td>
<td>These skills involve building a solid working relationship with the customer and being viewed as accessible, easy to work with, and focused on the customer’s needs. Customers are less concerned that the salesperson know them personally than they are about the salesperson being “on their side” and ready and willing to help them.</td>
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<tr>
<td></td>
<td>• Is easy to work with</td>
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<td></td>
<td>• Considers my needs</td>
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<td></td>
<td>• Reinforces my existing thinking</td>
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<tr>
<td></td>
<td>• Is accessible</td>
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Summary

Many salespeople mistakenly believe they must have a relationship with an executive before he or she will meet with them, so they’re passing up many opportunities to generate new business. Our data confirms what many of the best salespeople already know: Senior-level decision makers are very open to engaging with suppliers, even those whom they do not yet know, provided the supplier: 1) focuses on what matters most at the senior level—identifying and validating business opportunities and risks, and 2) comes to the table well prepared to crisply convey fresh thinking.

This approach is hard to master and requires a strong foundation in product knowledge, customer knowledge, business acumen, and consultative selling skills. Those who learn to apply point of view selling on top of this foundation are rewarded with significantly increased sales as well as opportunities to more deeply understand a customer’s business, thus setting the stage for further access to senior-level decision makers throughout the enterprise.

Criteria for Selecting Outside Resources

<table>
<thead>
<tr>
<th>Criteria</th>
<th>1 = not at all important</th>
<th>2 = not important</th>
<th>3 = moderately important</th>
<th>4 = critically important</th>
<th>5 = critically important</th>
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</thead>
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<tr>
<td>Credibility</td>
<td>4</td>
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<td>4</td>
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<tr>
<td>Analytical skills</td>
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<td>3</td>
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<tr>
<td>Teaching skills</td>
<td>4</td>
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<tr>
<td>Customer focus</td>
<td>4</td>
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Selected References


About the Authors

Jeffrey Baker is a vice president and leader of Forum’s Sales Effectiveness Practice. Jeffrey has worked directly with customers throughout his career, “carrying the sales bag” as a direct sales representative, leading sales teams, managing sales alliance partnerships, and running a customer service P&L, as he worked for companies such as AT&T, Siemens Communications, PictureTel (now Polycom), and Intervoice-Brite (now part of Convergys). Jeffrey received his bachelor’s degree in organizational psychology and economics from The University of Michigan.

Tom Atkinson, Ph.D., is director of client research at Forum. With more than 25 years of experience helping companies achieve measurable business results through learning, Tom focuses on assessing performance gaps, applying principles of workplace learning, and tracking results. Tom has conducted groundbreaking studies on such topics as how to increase sales and service effectiveness; how to prepare leaders to drive growth; how to enable companies to execute with speed; and how to create a high-performance organizational climate. His findings, which have been published in the Harvard Business Review and Chief Learning Officer, are the foundation for many of Forum’s learning programs.
Appendix: Survey Demographics

Respondents by Country

- Canada: 22%
- China: 15%
- United States: 15%
- United Kingdom: 15%
- Australia: 11%
- India: 16%

Respondents by Industry

- Business/Professional: 31%
- High Tech: 25%
- Financial Services: 11%
- Healthcare/Pharma: 7%
- Hospitality: 7%
- Energy: 8%
- Utilities: 8%
- Other: 4%

Respondents by Function

- Corporate: 31%
- Engineering: 14%
- Operations: 14%
- Purchasing: 14%
- Customer service: 14%
- Logistics: 8%
- Marketing: 8%
- Sales: 6%
- Other: 6%
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