



IT TAKES A

CLARE O'SHEA provides a practical guide to the different types of customers involved in the decision to buy your product or service

Too many sales executives, account managers and sales managers think they understand their customers, only to discover that someone else knows them better and steals the business from under their noses.

By really understanding the different people who affect the decision to buy your products and/or services you will be better placed to 'qualify out', or to put successful strategies in place to help you win more business. There are many different roles that a customer may assume and it is essential to understand which role individuals fulfil in order to plan the best strategy to meet their needs and help them buy from you. Here are some simple steps to help you understand your customer.

Identify key stakeholders

This is simple. Write down all the people who you believe have influence over the purchase of your product or service. You may need to do a little research here, so as to include details of people who have met this customer and when they were last in contact. Cast the net wide to include people such as external consultants,

accountants, other customers or anyone else who you believe has influence with this customer.

Classify the customer's role

It's important to remember that any individual buyer can have several roles. Imagine they are like hats — each buyer can have one or many hats and will be influenced by different motivators depending on which hat they are wearing — or which issue they are focused on.

The first difference is between decision makers and decision influencers.

The decision maker

The decision maker — also known as ultimate decision maker, economic buyer, budget holder, fox, main man or big cheese — is someone who can say yes or no to buying your product or service. They can say yes or no regardless of what others say as they can overrule them.

The decision maker has the budget for the product or service. Even if they have no budget put aside they are able to get the budget from elsewhere — often someone else's budget. Several people,

TOP TIP
Make sure you include people you have not yet met but you know have influence over buying your specific product or service



ALL SORTS...

such as a committee, can act as the decision maker. However, there is often one person 'who is more equal than others', perhaps due to personal interest in this particular purchase or by force of personality. For higher value, high risk or more complex purchases the decision maker will be at a high level, often on the board.

Decision influencers

Decision influencers can make a recommendation to buy or not, but their decision is not final. While it is essential for you to understand and work with the decision maker, to do so without working with decision influencers can be disastrous. Most business-to-business buying decisions are complex and involve many different roles. The key is to identify and manage all of the key relationships. The key decision influencers are as follows.

The tick list merchant — also known as specifier, evaluator or technical buyer — is responsible for specifying and then evaluating your product, service or company against their internal criteria. They 'tick you' — pass or fail you — against specific criteria, so allowing you (or not) to get through to the next stage in the buying process. They often reduce a long list of suppliers down to a shortlist.

They can be involved in procurement, legal, health and safety, IT, quality or finance. Remember,

some criteria are often more important than others, and sometimes 'weightings' are published, especially in the public sector.

The user — also known as end user, consumer or customer's customer — will ultimately use your products and services or supervise their use. For example, when selling computers to the finance department, they are the clerks and accountants who will actually be using the PCs. The user can also be your customer's customer. For example, when selling paper to a stationery company, the user is the customer of the stationery company who actually uses the paper.

If the user is not on board they can sabotage the sale, perhaps by not using your product or not using it to the full, resulting in a poor return on investment. Your reputation and the possibility of future sales will be seriously harmed.

Where there are many users, consider setting up user groups as a way of communicating and getting them onside. Identify and focus efforts on key users.

The gatekeeper — this is the customer who acts as a gatekeeper for people or information. They have control over access to people, information or processes and so have power to 'open the gate' to let you in, or not. They are often PAs controlling access to decision makers, but can be others.

TOP TIP
Decision makers often prefer a contact from your organisation with the same status as them. So involve your senior management or board members

TOP TIP
Why not help buyers to create their criteria? If you are involved early in the buying cycle you may be able to advise on suitable criteria. If you don't help them then someone else will



TOP TIP
Appeal to the altruistic and personal side of gatekeepers – ask for their help and get them on side. Don't forget to thank them for their help

◀ *The coach* – also known as internal salesman, champion or mentor – wants you and your company to win this particular piece of business. They are the person you ring first when you need answers, or the inside track. They will often help you to get the business by coaching you, giving you useful information and introducing you to key people.

The best coaches have two key characteristics:

- They like/respect you and you like/respect them
- They have credibility in their own organisation – preferably with the decision maker.

It is up to you to develop one or more coaches, as they are critical to your success. Review all your contacts and consider who you have already worked with who has these characteristics, then plan to develop them as a coach.

Analyse support for your organisation

What is the customer's level of support for your organisation and this particular piece of business? There are four choices.

- **Positive** – they openly support you, your solution and the need for change. They will not be supporting the competition.
- **Neutral** – they have not yet made up their mind who to support or may support the competition, but are open-minded towards you.
- **Negative** – they do not support your firm or your solution for this piece of business. They may be openly negative and/or they may support the competition.

TOP TIP
A coach takes time to develop and keep – make sure you help them with their business issues, keep them involved, offer help and always act with integrity

- **Don't know** – you do not have enough information to tell. They may be new to you.

A word of advice. It's worthwhile asking your customer early on to rate you and then to go back at a later date and ask them to rate you again. Have you improved and if not why not?

What is the customer's level of support for your people?

This is about measuring the strength of personal relationships with individuals in your organisation. Again, there are four choices.

- **Good** – someone you have met frequently; you work well together. You have knowledge of their

personal agenda and aspirations. They invite you to regular meetings.

- **OK** – they have met you frequently. You have some knowledge of their hobbies, personal interests and family situation and they accept invitations for meetings.

- **Poor** – they have met you and supplied you with basic factual data. Nothing more.

- **Don't know** – you have insufficient information to tell. Again, this may be because the prospect is new to you.

If you are struggling to gauge your customer's level of support, and you can't ask someone directly, ask one of your coaches what they think the other person thinks. Your coach's guess will be better than yours.

Identify stakeholder motivators

Finding out what the motivators are for the key stakeholders is essential to win business. The business motivators will be stated frequently by the organisation and are often clearly stated in any tender documents. But remember, different roles will have different motivators and priorities. For example, the decision makers often focus on return on investment, while tick list merchants focus on meeting the criteria as effectively as possible, and the end users focus on how it will improve their day-to-day working life.

The personal motivators are much harder to uncover. It will take time and will always depend on the level of trust between you and the other person. Ask your coach if you have one.

TOP TIP
Business decisions must be justified logically based on business reasons, but in reality they are often founded on personal reasons – so find them

Develop a relationship plan

The salesperson or account manager is responsible for managing a range of multi-level relationships with the customer.

You do not need to know every contact personally, but you need to manage these relationships. By using the techniques outlined above to analyse all your customers, you have started relationship or contact mapping. This process will highlight strengths and weaknesses.

Finally, the key questions to consider when developing your relationship strategy are:

- Where are the gaps, for example in information or relationships?
- Do you have the right relationships?
- Which are the strong relationships you need to maintain and use as leverage?
- Which are the weaker relationships you need to change or improve?
- Do you fully understand all your customer's key motivators?
- What is the current frequency of contact and planned frequency of contact?

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