

The Fearless Thinkers Podcast | Season 2, Episode 18
Anchoring go-to-market process and methodology to the customer journey, with Barbara Adey and Jason Davis

Masami:

Welcome to Fearless Thinkers, the BTS podcast. My name is Masami Cookson, and our host is Rick Cheatham, head of marketing at BTS. On today's show, Rick sits down with Barbara Adey and Jason Davis. Barbara Adey is head of BTS's sales and marketing GTM for North America. Barbara has unique expertise in optimizing the entire customer experience, from marketing through customer success.

Prior to joining BTS, Barbara had key commercial roles in several of the world's leading technology companies. Jason Davis is a Senior Director within the Sales and Marketing Center of Expertise at BTS. He has over 18 years of experience partnering with clients to build sales capabilities, leadership skills, business acumen, and customer understanding.

His industry experience spans tech, media, education, and CPG, among others. Prior to BTS, Jason spent 10 years in various sales and marketing leadership roles. Most recently, he was a vice president of sales and marketing within the education sector.

Hey Rick, what's up?

Rick:

Oh, you know, Masami, I finally got my yoga practice going again. It's really nice to kind of re-center and get that body awareness back, so to speak.

Well, hey, today with Jason and Barbara, we start to explore the world of sales methodology and historically sales leaders are hired and fired based on the, the methodology that they choose quite often sneak peek. The standard sales methodologies just aren't cutting it anymore.

And unless it's baked into what's uniquely you for your offerings and your customers, it just

isn't going to work. It's not going to get the right amount of adoption. Let's jump in!

Barbara, Jason, it's a pleasure for me to say welcome back.

Barbara and Jason:

Thank you. Thanks for having us, Rick.

Rick:

So, Jason, what's been going on in your world?

Jason:

Uh, four weeks of international travel and delivery. I am mercifully back home in Chicago. Although, my wife is now on her three straight weeks of travel. So, we high-fived in the airport this weekend.

Rick:

Oh my gosh, I'll never forget the time that I had so much travel. I packed two suitcases, landed here in Austin, and just took my dirty clothes suitcase and threw it back in the trunk. Got my new suitcase and just kept rolling.

How about you, Barbara? Hopefully not as, uh, crazy with world travel.

Barbara:

Not as crazy with world travel. For me, it's a much more minor adjustment to the fall. I find it too dark in the morning for my 5k. So that's my first world problem.

Rick:

It is a tough one when the light starts getting shorter, and shorter, and shorter...

Hey, I'm thrilled that you were both able to join us today and explore the world of sales methodology. I'm just curious if you can update us on what your current findings are.

Jason:

The big thing that we're seeing a ton of now is a focus on customer-back. What is the process that customers are really going through as they're first interacting with an organization? And then, how their journey evolves over time to becoming a customer and then staying a customer. And then, at each one of those stages, what is it that they need, and how those needs change.

Barbara:

We are also hearing from clients more generally about some of their challenges in sales success. For example, a new acquisition (or two) that has brought two or three companies together that have different methodologies.

They also, in some cases, are finding it more difficult to forecast their business. That's a reason to look at methodology as a way to address that.

Lastly, they're looking at the way they develop their teams across the selling cycle. And in order to do that well, they need a consistent methodology across the company.

Rick: When you start thinking about a unified sales methodology that people can really lean into, how does that work in today's environment?

Barbara: As our clients are considering this, they're realizing that value is contextual. It depends on where their end customers are in their decision cycle. It depends on where their customers are in the world, and possibly even which industry vertical their customers are a part of. At a minimum, those three things need to be customized for the sellers to be able to make a case.

Jason: I'd add two things to that, Barbara. One, the number of stakeholders and decision makers that have to weigh in just keeps growing, and each one of them has a different set of priorities. Sometimes they overlap; sometimes they're actually conflicting. Understanding where customers are in the sales process is a part of the equation, and also understanding who at that customer that's making a decision is the other part.

And in some cases, part of the sale is just helping to align those stakeholders, not even necessarily positioning the value of what it is you're selling. There's more than just solving a business problem, or even tying to an initiative or an outcome or a result.

We've seen even more customers that are making some of their buying decision on the experience of what it's like to work with you. So, having the agility to have a broader value conversation – on top of having the ability to target that value to the right stakeholder at that time, to the right position for this customer and their decision-making process –

[those] are also bigger things that we're seeing.

Rick:

Part of what I'm hearing you say is the value a great seller can bring potentially is helping their customer make the decision faster even if they don't pick you.

Jason:

That is part of that experience value proposition. Because, even if during this particular opportunity they might not pick you... The fact that they were able to get value out of the conversation with you and you were able to help get stakeholders aligned or make things smoother, sets you up for something later.

Barbara:

We're seeing the downside of off-the-shelf methodologies with our clients.

The first thing is, they're not so effective. For example, one of our clients that worked through creating a custom methodology with us, they were seeing that the tools that they were buying off-the-shelf had 7 or 8 percent take rate. The methodology that they had paid for was really just not adopted within their organization.

The other piece is cost. As our clients have purchased off-the-shelf methodologies, that's a regular fee every year for the same stuff except for a growing set of sellers. It's causing them to rethink.

The punchline for us is that everything needs to start from the customer journey. What does their customer need at key decision points, and then, how are they showing up as a whole organization (across not just sales, but also marketing, and customer service, customer success) to make their customer feel confident in their purchase.

Jason:

The off-the-shelf forces sellers or marketers or customer success folks to take the same approach time and time again (and it gets difficult when your customer wants to have a different conversation, or likes to receive or share information differently): [taking] a more unique approach to the organization, and looking at what your teams, your sellers, your marketers, your success folks are really good

at, and at the same time, [giving] them the freedom to meet customers in the conversation, the way that they want to be met.

Rick:

When we think about the seller's mindset, they've got to believe that what they're being asked to do is best for them, best for their customers, and then, usually in this order, best for the company. To just say, "Hey, run out there and robotically follow this formula," I can see why people are rejecting that aggressively, especially with those stats you were giving us, Barbara: 7, 8 percent on a huge investment.

Barbara:

It's a mindset for sales leadership, for sales enablement leadership, to really take on board what is unique about us. As a company, is what is going to drive our success. That's the opposite of, oh, we're in a hurry. Let's just do something fast and use a methodology that's off-the-shelf.

I'll just give an example of why custom works. So, a very important point from a company side, [or] sales operations side, is to look at the opportunities that are in Salesforce. At a minimum, the sales manager, the director, or even the VP, needs to confirm that, "Yes, we know when the customer is going to make a decision. We know how big the deal is. And we know what it's going to take for us to be successful in implementing this deal."

Most importantly, as an organization, we need to know who are the decision makers that are going to need to sign off. There's this moment of inspection, which ideally is done for every deal of substance, and that tool is something that needs to be customized to the organization, to our client, and also, it needs to be stored in a place where everyone can see it, the inspection happens, it gets signed off, and you're confident in putting this data in Salesforce.

It's all about forecast accuracy, which is, I mentioned earlier, one of the things CROs are most worried about.

Jason: When you combine things being placed at an easy spot for a seller or an individual to get their hands on and utilize, with an approach or a methodology that just feels natural, it takes away some of the friction that we see in people not utilizing things and or just doing the bare minimum, because that tool is in the right place and aligns to the conversation I'm going to have with my customer, it's way easier for me to use it and it's much more likely that I'm going to put good information into it so that in turn my leaders can get good information out of it.

Rick: It all begins with the customer journey, and a subset of that being, how they make buying decisions. And we flow from that to a sales methodology that's based on the key actions that have to happen at certain moments of time.

Jason: The customer's journey becomes the anchor point. The methodology becomes the philosophy: how you want customers to think and perceive your organization.

Barbara: There's a premium here on meeting the customer where they are. We can understand their buyer's journey, but if we don't adjust the resources that we need to bring at specific points, then it's a miss.

Rick: How do I even begin to do that for a sales organization of any size?

Jason: A custom look at each of our clients makes a big difference. Step one is: get a clear picture in the minds of your sellers of what the journey their customers are going to go through is. Along the customer journey, what are the moments in time that really make the most difference to help them move their decision-making process forward, get their stakeholders aligned, and advance to making a purchase or making a repurchase? When that moment does happen on the job, they're ready to go.

Barbara: We're not really starting from scratch. When we approach a client opportunity, we can assess where they are more quickly than if we were just starting from a blank page.

Rick: I'm glad you brought that up, Barbara, because I don't necessarily have the time or potentially the money to take everything from nothing – the concept that we can start from a base – [not] necessarily just shift my methodology, but I could potentially shift my moments, so I don't have to push the reset button with my sellers – but instead, [that] I can build from strength and build new focus.

Jason: As you look at critical moments, and as you connect them into your methodology, the goal of your methodology is at that particular point in time, you want your customers to be thinking and feeling a certain way about your organization. And depending on the product line, the territory or region that you're selling into, or the industry that you're in, the interaction points will vary. Even within your company, you might have one really mature product where customers first interaction points aren't with live humans. They're in fact more likely to be in e-commerce platforms, and how you convey the right feeling and thinking that you want your customers to get there, is going to be different than the first time when they talk to somebody, which will be later on in the process.

Conversely, if you're, if you've got another product offering that's relatively innovative or pretty complex, those earlier interaction points with customers are likely to be live, where your sellers have to be more inquisitive. They have to spark some curiosity, to raise some awareness of what's possible at that moment in time for the customer, to get towards the right feelings and the right thinking.

Barbara: To give an example we've seen in B2B markets for at least five years now a high level of self-service selling by the most sophisticated

buyers. A CISO, Chief Information Security Officer, doesn't want to sit through introductory meetings with sellers for half the day. That person wants to learn a lot about your product, your service, on your website. And the first time they talk to you is going to be when they're ready to negotiate a deal. There's a critical moment around how you show up with your website, and there's a critical moment around how your high-touch salesperson shows up in that first conversation.

Jason:

Barbara, you've got me thinking about another dimension that also influences critical moments, and it's the strength of existing relationship.

If you're long-perceived as a trusted advisor to a customer, you're likely to get involved in some of those earlier thinking conversations where they sort of recognize they have a need, but they're not entirely sure what it is, and haven't put words to it. Because of your trusted status, you might get invited to those conversations, where the goal is just to help them to really recognize what that is and put some words to it. Whether it's a transactional buy, whether it's a strategic buy, whether it's something that's really complicated or something that gets bought frequently over time – based on the depth [and strength] of your relationship, you might get invited to a new critical moment.

Rick:

If I am a sales manager out there that has a small region or has a certain vertical that I'm working in, and I'm not able to shift my whole company to a custom sales methodology, what's your best advice for me?

Jason:

Step one for me is, how well does your team know the journey their customers are going through? If they're really comfortable and conversant in that, then you can move forward. But if that's something that's not really clear for them, that would be the first thing: to get clear on the journey your customers are going through.

Step two is, within that journey, what are the conversations or the moments with customers that seem to matter more than the rest? To recognize those, before they're happening, so that they can be prepared for them.

The third thing is any internal training or resources that you have that can give your team the skills they need in those moments: lean on those things to help them get better, in those critical moments, so that they can really align to the customer's journey.

Barbara:

The coaching piece is so important. Coaching is about really noticing where your team is doing well and where they might need help.

Second, there's no replacement for the old saw, "You get what you inspect." At key points in the sales cycle, there's no substitute for paying attention, for making people on your team that [feel like] you're bought into their success.

Rick:

Well, as always, really appreciate your time and your thinking here. I'm sure you'll be back soon enough.

Barbara and Jason:

Thanks for having us, Rick. Pleasure to be here again.
