

Foreword by Neil Rackham
Bestselling Author of *SPIN Selling*

INSIGHT SELLING

*Surprising Research on What
Sales Winners Do Differently*

MIKE SCHULTZ and JOHN E. DOERR
Bestselling Authors of *Rainmaking Conversations*

WILEY

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Insight Selling

Surprising Research on What Sales Winners Do Differently

Mike Schultz
John E. Doerr

WILEY

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For my son, Ari, and his congenital heart defect warrior brothers and sisters everywhere.

—Mike Schultz

For Mom.

—John E. Doerr

Foreword

A mixed blessing of my job is that I get to review a lot of sales books. Roughly once a week I receive a manuscript from a hopeful author or publisher, asking me for comments and feedback. Of course, what they are *really* asking for is a rave review that will help the book sell. Reading all these expectant winners, looking for good things to say, can be a challenging task. I'm often tempted to reply with the comment often, but wrongly, attributed to Samuel Johnson: "Your work is both good and original. Unfortunately the parts that are good are not original, and the parts that are original are not good." On the plus side, it does mean that I see a lot of ideas before they become public and I get a good sense of current trends in sales thinking. On the downside, for every book that I can honestly endorse, I kiss a whole pondfull of literary frogs.

I ask you to forgive me a moment's bitching if I pick out a particularly unhelpful trend in many of these about-to-become-best-selling business books, especially those in sales, that use what I call the *Armageddon selling* formula. The approach goes something like this: "Everything you've ever learned about sales is wrong and, unless you stop doing it instantly, your sales efforts will shortly die in agony. There is, however, one simple cure that I have discovered. It is . . ." and here the author puts in a pitch for the appropriate magic bullet, such as "my prospecting method," "my selection system," "our funnel management process," or "our trademarked social media analytics"—take your pick. The reason why I mention the Armageddon formula for writing a best seller is that Mike Schultz and John E. Doerr's new book is mercifully free of it. They go out of their way to show that many, if not most, of the skills,

knowledge, and selling methods we have learned over the years will continue to matter in the future. Admittedly our present ways of doing things will need to be refocused and retuned to align them with the rapidly changing sales world, but existing methods are not outdated and are certainly not useless. Our present processes and procedures are a robust base on which we can build better selling for the future. That's an unusual message in a world where most sales books and sales gurus tell you to start by throwing out everything.

The Armageddon approach to sales doesn't help anyone. When, for example, a serious journal like the *Harvard Business Review* publishes an article titled "The End of Solution Sales," it damages the credibility of all involved. The sales field has been growing up nicely in recent years: It can live without this kind of overstatement. As Schultz and Doerr point out, solution selling (or consultative selling, as I prefer to call it) isn't dead or finished; it just needs to adapt to the new sales world. They set out a convincing road map for how to achieve this.

The majority of experienced salespeople would agree that a lot of our existing wisdom is good while readily admitting that some things have become outdated and must change. That should not be, in itself, a controversial issue. The hard part, as *Insight Selling* explains, is deciding what to keep, what to change, and what to discard. Take relationships, for example. The traditional wisdom has long taught that relationship building is the foundation of all business-to-business selling and much of consumer selling, too. However, particularly since the publication of *The Challenger Sale* in 2011, the Armageddon enthusiasts have been widely putting it about that relationships have become unimportant and that relationship selling is in its death throes. Again, nothing could be further from the truth. What has changed is the way customers form

relationships. In the past, the sequence was for salespeople to build the relationship first and then to sell. Today few customers have the time or the inclination to build relationships before the sale. Instead, the relationship is the reward that customers give to salespeople who have created value for them. So, the sale comes first and the relationship building starts from there. That's very different from the Armageddon selling position that relationships are unimportant, just because they are no longer built in the same way before the first sale.

Schultz and Doerr lay out a convincing case for which parts of current practice must change and which need gentle retuning to work better in the new selling world. They base their recommendations on research and, better still for me, on the kind of research design I like. Too much sales research rests on the black-versus-white methodology of comparing extremes. So, top performers are compared with poor, good practice with bad, successful companies with unsuccessful. In my experience this method reveals much more about failure than about success. Give me research any day that compares winners with those who almost won. That's how you learn about those all-important little extras that separate those who make it to the top. In testing the models and recommendations in *Insight Selling*, the authors have used a research design that separates the winners from those who came in a close second. I like that, and I like that they based their research on customers rather than on salespeople. Too many sales models, even today, are about how we want to sell rather than how our customers want to buy.

The model that they propose is fairly simple—again, music to my ears. Most of the books I review rest on deplorably complicated models. I asked one author why she needed a 14-step process in her book. “Because it's nearer to reality,” she responded. “Anything less than that would be a

simplification.” For her, the best test of a useful model was how close it came to the real world—and most people who haven’t given the issue much thought would probably say the same. I believe otherwise. If the real world was that great, we wouldn’t need models; we’d just use reality directly. The sad fact is that the real world is noisier, messier, and far more complicated than we can handle. That’s why we need models. The perfect model simplifies reality but retains validity.

The authors of *Insight Selling* explain their research on what sets the winners apart through a three-step model.

Level 1 of the model is *connect*. It explains how winners have a different way to link customers, products, and solutions.

Level 2 of the model is *convince*. It shows how the winners do a better job of differentiating, showing return, and—for my mind, an undervalued set of sales skills—handling the customer’s perceived risks.

Level 3 of the model is *collaborate*. It covers how the winners educate with new ideas and perspectives, set shared goals, invest in customer success, and create a customer perception of working as partners.

Within this mercifully simple framework, you’ll read detailed reasons for why some salespeople win while others come in a close second. Also, you’ll probably find, as I did, that you’ll sometimes kick yourself, remembering sales where you came so close and how, if you’d just done that one thing differently, you could have walked off with the prize. And you’ll find yourself thinking, “Ah, yes! That explains it!” Equally valuable, this book will give you insights into those times when you came in first but didn’t quite know why. Either way, you stand to learn something useful from *Insight Selling*.

—Neil Rackham
Executive Professor of Professional Selling
University of Cincinnati

Preface

One of the best Henny Youngman one-liners goes something like this: “I told the doctor I broke my leg in two places. He told me to quit going to those places.”

If you sell, you go to those places every day. We know sellers who have worked on deals worth tens, even hundreds, of millions of dollars, for multiple years—and lost. More than a few of them might have preferred the broken leg than coming in second place. Even when sales are much smaller, it’s no fun to lose.

However, if you don’t go to those places and risk the broken leg, you miss the chance to feel the rush of winning a sale and making customers’ lives better because they made the right decision and bought from you. There’s no question, however, that you win some and you lose some.

The idea, though, is to win as many as you can and win as big as you can. At the same time, although you can never avoid them all, you should direct your energies away from those places that might as well have a sign over the door that reads, “Today’s special: broken legs.”

Just a few weeks ago, we were speaking with the leader of a multibillion-dollar global consulting firm. His top-performing strategic account managers were selling triple what the average strategic account managers sold and growing their accounts at a much faster pace. We asked him, “In your observation, what do you think sets apart the top performers from the rest?”

After a long pause, he said, “They make the magic happen.”

He’s right. They do. It would be fabulous if we could take a set of sellers—be they full-time salespeople or leaders,

professionals, and entrepreneurs who also sell—and just tell them, presto change-o, “Go make the magic happen,” and have that be enough. We haven’t yet figured that one out. Fortunately, behind every amazing magic trick is a detailed and meticulously planned set of actions a skilled magician executes in just the right time and sequence to make it happen. We’ve made it our mission to figure out and break down what’s really going on to make the sales magic happen and to teach sellers how to do it in a deliberate way through education, coaching, and practice.

If you want to sell at your maximum potential—if you want to make the magic happen—don’t listen to Henny’s doctor. Listen to Bilbo instead: “It’s a dangerous business, Frodo, going out of your door,” he used to say. “You step onto the road, and if you don’t keep your feet, there’s no knowing where you might be swept off to.”

For those who take the lessons presented throughout these pages to heart, and are willing to do the hard work of becoming an insight seller, our research and our experience tell us the place you’re most likely to be swept off to—is the winner’s circle.

Like sales, to write a book, you have to make the magic happen. We certainly didn’t make it alone. First, thanks to Mary Flaherty because without her passion and perseverance on the research behind *Insight Selling* and the book itself, neither would have ever come alive. With much appreciation, we’d like to acknowledge our colleagues at RAIN Group: Kaitlyn Bissonette, Jon Carlson, Bob Croston, Michelle Davidson, Steve Elefson, Ted Hill, Cynthia Ironson, Beth McCluskey, Deniz Olcay, and Erica Stritch. Not only does their dedication allow us to take the time needed to write, but they also supported the heavy lifting required to conceptualize, research, and produce a book of this nature. Thanks to Ago Cluytens in Geneva and

Jason Murray and Andy Springer in Sydney, for their work every day helping clients win with RAIN Group's intellectual capital and training.

The primary research on which *Insight Selling* is based includes study and analysis of more than 700 corporate purchases and more than 150 conversations with buyers regarding their buying experiences. A number of these buyers, many of whom are or have been C-level executives at multibillion-dollar corporations, agreed to allow us to quote them directly about their experiences in making major corporate purchases. Thank you to Gerry Cuddy (president and chief executive officer, Beneficial Bank), Jack Kline (president and chief operating officer, Christie Digital Systems USA, Inc.), David Lissy (chief executive officer, Bright Horizons Family Solutions), Jeff Park (executive vice president and chief financial officer, Catamaran), Steve Satterwhite (founder, Entelligence), Leonard Schlesinger (Baker Foundation professor of business administration, Harvard Business School, and former chief operating officer, Limited Brands), Jeff Somers (principal, Rothstein Kass), Dr. Wayne Tworetzky (director, Fetal Cardiology Program, Boston Children's Hospital, and associate professor of pediatrics, Harvard Medical School), and Sandy Wells (executive vice president, Employer Services, Bright Horizons Family Solutions). Thanks also to Professor Neil Rackham for a lifetime of insight in the world of selling and for writing the foreword to the book.

To our valued clients, thank you for the privilege of working with you and accepting us as members of your teams. Finally, we are both grateful for the love and constant support of our families. You make it all worthwhile. (Most of the time.)

Chapter 1

Sales Winners Sell Differently

The New World of Selling

It's old news that buyers have a lot more information about everything than in decades past. Primarily through the Internet—but also through increased availability of research and use of consultants—buyers know more about your offerings, market, and competitors, and their issues and problems, industry, and options for action, than ever before.

Also fairly well established is that today's buyers are harder to reach, buying cycles are longer, and more decision makers are involved in every sale. Buyers are also more skeptical. Although the great recession is largely in the rearview mirror, the psychological scars will remain for years to come.

Yes, buying has changed a lot, yet from the 1970s until recently, not much changed in the world of sales methodologies. The prevailing thinking in recent decades has been sellers could study and learn traditional solution or consultative selling approaches, apply them well, and produce excellent results consistently.

Not anymore.

Given the changes in buying, the commoditization of many products and services, and the radical intensification of competition in many industries, it's no surprise that solution sales concepts aren't working as they once did. We at RAIN Group are not the only ones seeing this trend either. Articles in the mainstream business press, including

the *Harvard Business Review*,¹ routinely raise the specter of the death of solutions sales.

In any case, it's a new world in selling. As is the way of things, with the sunset of one paradigm comes the sunrise of another. Those sellers still living in the old paradigm, however, are losing sales. It's not surprising, then, that the pace of companies calling us saying, "How we used to sell isn't working anymore" has been accelerating for years and seems to have reached a tipping point.

Yet as these sellers report more losses, buying is still happening! This means *someone* is winning. This raises a fairly obvious question: What are they doing to win?

Analyzing What Sales Winners Do Differently

What's Actually Happening

An obvious question, perhaps, but it seemed like a good one to ask, so we did. We wrote this on our whiteboard in big red letters:

What are the winners of actual sales opportunities doing differently than the sellers who come in second place?

To find the answer, in late 2012 and into early 2013 we began studying actual purchases in industries with complex sales, such as technology, consulting and professional services, financial services, industrial products, and a variety of other business-to-business (B2B) industries. The results of this study focus on more than 700 B2B purchases made by a broad sample of buyers. In aggregate, these buyers were responsible for \$3.1 billion in annual purchases. Along with our survey research, we've now

spoken to more than 150 corporate buyers about their recent purchasing experiences.

Here's what we found:

1. Winners sell *radically differently* than the second-place finishers. In many ways, what sales winners do differently is both surprising and fascinating.
2. There's a specific combination of behaviors that sales winners exhibit and outcomes they achieve that the second-place finishers don't.
3. Several key factors that set apart the winners are rarely discussed in the world of selling. These now demand attention.
4. With all due respect to the *Harvard Business Review*, solution sales is definitely not dead. However, although solution sales concepts are still necessary, they're no longer sufficient to win sales. Also, fundamental solution sales concepts need reimagination and relabeling. They need to evolve.

Before we share the specifics of what we found, it's important to note we did not have preferences for what the results would show. Our intent was to find out what's really going on and proceed from there. We expected the results would influence our thinking, our sales consulting, and our RAIN Selling training process and programs, requiring us to make updates and changes. Indeed, this has been the case.

Research from the Buyer's Perspective

One of the interesting things about reading sales books and articles is that much advice seems to make sense on its face, even to us after 50 collective years living in the sales training and enablement world. Although, with a few

exceptions, most selling methods sound fine, the reality is that some of them are wrong, or at least wrong for certain businesses and people. It's not, however, easy to suss out the good advice from the bad.

There are a lot of ways to do the sussing, too. Not all of them are helpful. Sales research methods often focus on asking sellers, sales managers, and company leaders what the top performers do versus average performers. Unfortunately, people's perceptions of what they do—and what they actually do—don't tend to match up.

For example, Hinge Research Institute recently studied buyers and sellers across several B2B industries about the buyers' perceptions of seller companies' selling and marketing practices. Dr. Lee W. Frederiksen, managing partner of Hinge, told us, "Across the board, sellers and buyers think tremendously differently about what's important. For example, sellers vastly overestimate the role of price in closing the sale. They see it as more than twice as important as the buyers view it."[a](#) We see the same incongruity in buyer and seller perceptions. We recently polled several hundred sellers on some of the same questions we asked the buyers in our study. What the buyers perceived about what sellers did, and what the sellers perceived what they, themselves, did, were markedly different.

The primary research on which *Insight Selling* is based looked at sales from the buyers' perspective. As mentioned, our objective was to find the answer to the question, What are the winners of *actual* sales opportunities doing differently than the sellers who come in second place? We looked at it, however, through the eyes of the buyers. This approach allowed us to get past sellers' perceptions of themselves and their colleagues and concentrate on the buyers' perspective and what actually happened in the field

of play. After all, buyers make purchase decisions based on their perceptions. This is what matters.

Six-Prong Analysis Yields Fascinating Story

We asked buyers to consider recent major purchases and rate the winner (the seller who won their business) and the second-place finisher (the other seller they most seriously considered in the buying process but who ultimately came in second place). Our objectives were to see:

1. What winners *do*: Simply, what are the behaviors they exhibit and impressions they make on buyers?
2. What winners *do more often* than the second-place finishers: The idea here was to understand what *most separates* winners from second-place finishers.
3. What the buyers told us the second-place finishers should *change* to make the buyers more likely to choose them; in other words, we wanted to know what the buyers perceived to be the most important factors in their decision making.

We also looked at the statistical key drivers^b of buyer:

1. Satisfaction with the buying process
2. Likelihood to buy again
3. Likelihood to refer the seller

The first three categories are the keys to winning the current sale. They're what the sellers do to win now, so to speak. The latter three help to win now, but mostly they are the keys to win later.

Each of these six categories turned out to be pieces of a puzzle. When we viewed all six pieces together, an elegant and fascinating story emerged. It turns out not only do the winners sell radically differently than the second-place finishers, but they also sell *similarly to each other!* In *Insight Selling*, we've done our best to codify what the winners look like and explain what they do. The idea is that—for those sellers willing to make changes to how they sell—they can maximize their current wins and their ongoing selling success. We call this model 3 Levels of RAIN Selling.

As you begin reading about the 3 levels, note that sellers should learn and apply them not separately or in sequence, but as a combination. Applied in combination, there's a compounding effect as the various areas build on and reinforce each other. At the same time, leave a level (or piece of a level) out, and you introduce barriers to winning competitive sales and increase the odds of losing to no decision.

3 Levels of RAIN Selling

We categorized our findings into 3 levels of selling behaviors and outcomes that set the sales winners apart from the second-place finishers. Following are the highlights.

Level 1 Is Connect.

Winners *connect the dots* between customer needs and their company's products and services as solutions more often than the second-place finishers. Winners also *connect with people*. They're perceived to listen and connect personally with buyers more often.

Connecting with people and connecting the dots—this sounds a lot like relationship and solution selling to us. Not

only is connecting still relevant (and not dead!), but it's also critical. However, sellers used to win on level 1 *alone*. Now it's the price of entry.

Level 2 Is Convince.

Winners convince buyers that they can achieve *maximum return*, that the *risks are acceptable*, and that the seller is the *best choice* among all options. Many sellers are not good at convincing buyers, and a large portion of sellers aren't even willing to convince. When they can and do, they win more sales.

Level 3 Is Collaborate.

Winners collaborate through behavior—they are perceived to be responsive, proactive, and easy to buy from (i.e., collaborative in *how* they work). At the same time, it's not just *how* sellers interact; it's *what* they do. Buyers believe that the winners actually collaborate with them during their buying process, in other words, collaboration in the sense of working with the buyer to achieve a mutual goal. Buyers perceived collaborative sellers to be integral to their success.

Connect, convince, and collaborate. This is what sales winners do both more often, and better than, second-place finishers (see [Figure 1.1](#)).

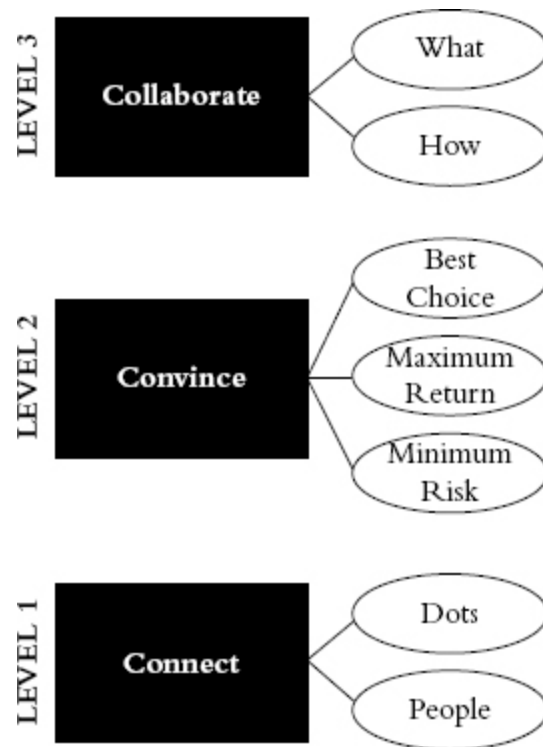


Figure 1.1 3 Levels of RAIN SellingSM

Level 1: Connect

Connecting the Dots and Solution Sales

Sellers who win connect. They *connect with people* and *connect the dots* between needs and solutions. This is a surprising finding—sort of. Given that the end of solution sales was announced in the *Harvard Business Review* and that they also published articles recently about how selling is not about relationships,² we expected to see that winners had abandoned these tried-and-true sales concepts, and that they are, indeed, dead.

Not true.

In fact, we found the opposite was the case. Solution sales is not dead—not even mostly dead. But it has changed in two important ways:

1. It's *no longer sufficient by itself* for success.
2. People need to *think about it differently* than they might have in the past.

Although people define solution sales in a number of ways, at the core of the solution or consultative concept is connecting the *pain* of the buyer with the products, services, and overall capabilities of the seller as *solutions*. There's typically a heavy emphasis on the seller diagnosing the needs of the buyer.

The need for diagnosis implies the buyers don't have a thorough concept of why they find themselves in their current undesirable situation or what to do differently. Through diagnosis, the seller figures this out like a doctor might with patients who feel sick but don't know what they have or what to do to get better.

These days, *diagnosing* needs isn't nearly as important as simply demonstrating *understanding* of needs. Of all the factors buyers experienced with the sales winners, "deepened my understanding of my needs" fell near the bottom of the list (ranked 40 of 42 factors). Winners barely did it at all compared with the rest of the factors, yet they still won the sale.

The second-place finishers focused more often on diagnosis than the winners, yet they still lost. Situationally, diagnosis can be important. If the buyer wants to make improvements but doesn't know what the issues are, diagnosis is necessary. But at a macro level, it's not as important as it used to be.

However, although sellers may not have to diagnose as often or deeply anymore, they do have to demonstrate *understanding* of need. This is critical. The terms may seem similar, but throwing the *understanding* baby out with the *diagnosing* bathwater is not a good idea.

Looking at the differences between the winners and the second-place finishers, “understood my needs” represented the fifth-largest gap ([Figure 1.2](#)). In fact, the winners demonstrated they understood the buyer’s needs 2.5 times more often than the second-place finishers.

On top of that, of the 42 factors, “understood my needs” was the fifth most important factor buyers said the second-place finishers should change to win their business.

Diagnosing versus Demonstrating Understanding

Here’s an example. After a first sales conversation, sellers often summarize their thoughts and an action plan in a document for buyers. However, we recently saw a situation where the opposite happened. The *buyers* sent the *seller* a document outlining what they understood their challenges to be, why they thought the challenges existed, what they were planning to do, and what they wanted from a seller. The buyers had this prepared beforehand to send to sellers who passed the buyers’ sniff test in a first call.

Sometimes a buyer’s perception of what’s happening misses the mark. But, in this case, it was thoughtful and on-target. Thus, the seller didn’t need to spend much time diagnosing the needs. Rather, the seller focused on listening to the buyers and talking with them about possibilities for how to move forward. Although the seller didn’t diagnose, the eventual proposal communicated that the seller got it regarding who the buyers were, what they needed, and what they were hoping to achieve with an external provider. This turned out to be a very important decision criterion to the buyers, and the seller won the business.

This isn’t to say that buyers have it all figured out all the time. With the Internet and other sources of information readily accessible, buyers are just typically further along in the process than they used to be when they engage sellers.

As Jack Kline, president and chief operating officer, Christie Digital Systems put it: