

Whale | Hunting

How to Land Big Sales and Transform
Your Company

**Tom Searcy and Dr. Barbara
Weaver Smith**



John Wiley & Sons, Inc.

Advance Praise for **Whale Hunting**

“*WHALE HUNTING* is the type of business book that I wish we saw more of. It has a specific and well-defined purpose—to teach managers how to land really big accounts—and it delivers on that purpose in a clear, practical, convincing, and entertaining way. I can tell you that it not only maps well into the big-account sales process but it also makes for fascinating reading. Simply put, it works.”

—*Dave Godes, Associate Professor of Business Administration, Harvard University*

“Searcy and Smith introduce a nine-phase sales cycle to help small- to mid-sized companies accelerate their growth by capturing a ‘whale.’ *Whale Hunting* shows readers how to create this process and duplicate it again and again. A must-read for anyone who is trying to capture a whale of their own!”

—*Cathy Langham, President of Langham Logistics*

Whale | Hunting

Whale | Hunting

How to Land Big Sales and Transform
Your Company

**Tom Searcy and Dr. Barbara
Weaver Smith**



John Wiley & Sons, Inc.

This book is printed on acid-free paper.

Copyright © 2008 by Tom Searcy and Dr. Barbara Weaver Smith. All rights reserved

Published by John Wiley & Sons, Inc., Hoboken, New Jersey

Published simultaneously in Canada

Wiley Bicentennial Logo: Richard J. Pacifico

No part of this publication may be reproduced, stored in a retrieval system, or transmitted in any form or by any means, electronic, mechanical, photocopying, recording, scanning, or otherwise, except as permitted under Section 107 or 108 of the 1976 United States Copyright Act, without either the prior written permission of the Publisher, or authorization through payment of the appropriate per-copy fee to the Copyright Clearance Center, Inc., 222 Rosewood Drive, Danvers, MA 01923, (978) 750-8400, fax (978) 646-8600, or on the web at www.copyright.com. Requests to the Publisher for permission should be addressed to the Permissions Department, John Wiley & Sons, Inc., 111 River Street, Hoboken, NJ 07030, (201) 748-6011, fax (201) 748-6008, or online at www.wiley.com/go/permissions.

Limit of Liability/Disclaimer of Warranty: While the publisher and author have used their best efforts in preparing this book, they make no representations or warranties with respect to the accuracy or completeness of the contents of this book and specifically disclaim any implied warranties of merchantability or fitness for a particular purpose. No warranty may be created or extended by sales representatives or written sales materials. The advice and strategies contained herein may not be suitable for your situation. You should consult with a professional where appropriate. Neither the publisher nor author shall be liable for any loss of profit or any other commercial damages, including but not limited to special, incidental, consequential, or other damages.

For general information on our other products and services or for technical support, please contact our Customer Care Department within the United States at (800) 762-2974, outside the United States at (317) 572-3993 or fax (317) 572-4002.

Wiley also publishes its books in a variety of electronic formats. Some content that appears in print may not be available in electronic books. For more information about Wiley products, visit our web site at www.wiley.com.

ISBN-13 9780470182697

Printed in the United States of America

10 9 8 7 6 5 4 3 2 1

*We dedicate this book to Jen Searcy and Larry Smith,
with love and gratitude.*

Contents

<i>Foreword</i>	<i>xiii</i>
<i>Preface</i>	<i>xvii</i>
<i>Acknowledgments</i>	<i>xxi</i>
<i>Author Biographies</i>	<i>xxiii</i>
CHAPTER 1 The Whale Hunters’ Story	1
Inspiration from the Inuit whale hunters— how we got here.	
CHAPTER 2 Signs of the Times	7
Brief history of why the sales process is more difficult and complex today than it used to be; overview of the Whale Hunters’ Process.	

CHAPTER 3	Know the Whale	33
	Define your ocean, chart your waters, and create a target filter.	
CHAPTER 4	Send Out the Scouts	65
	Populate your whale chart, complete dossiers, define whale signs, create a tracking system, and establish performance metrics.	
CHAPTER 5	Set the Harpoon	87
	Plan your initial contacts, control “the aperture of perception,” go in the right door, and ask great questions.	
CHAPTER 6	Ride the Whale	109
	Launch a boat, analyze the buyers’ table, power your boat, and define metrics for the boat’s performance.	
CHAPTER 7	Capture the Whale	131
	Define the steps of progressive discovery, progressive disclosure; map your process, and refine your proposals.	
CHAPTER 8	Sew the Mouth Shut	159
	Stage the “big show,” anticipate spoilers, use your chief, and get on the whale’s calendar.	

CHAPTER 9	Beach the Whale	183
	Prepare your village, accelerate capacity and velocity, align reward systems, and communicate with the whale.	
CHAPTER 10	Honor the Whale	205
	Build a fast-growth culture, make and keep promises, improve handoffs, and control barnacles.	
CHAPTER 11	Celebrate the Whale	227
	Conduct “lessons learned,” communicate your gratitude, feed the ravens, and search for ambergris.	
	<i>Epilogue: Let the Hunt Begin</i>	245
	<i>Our challenge to you!</i>	
	<i>Glossary</i>	247
	<i>Index</i>	251

Foreword

WHALE HUNTING is a confluence of business writing, practical skills, and consumerism. It should resonate with anyone who runs a business—if not, they won't be in business very long. Tom Searcy and Barbara Weaver Smith, through their unique partnership and history of successful entrepreneurship, serve up whale hunting as the DNA of service-focused organizations.

Whale Hunting has a mission and a message that are easy to understand. The book is interesting and fun. The authors' method resonates in a way that other sales approaches don't. Typical sales training doesn't change the vernacular, but whale hunting, through its metaphor and language, gets people excited about thinking differently.

As I read the principles and ideals of the whale hunting philosophy expressed in this book, it struck me that every company faces the problems that Searcy and Smith illustrate, and then resolve.

I live on the service side of the business world; everything we do is about expanding and improving on the service to our customers.

My company is quite large. We have 1,100 employees in the United States and 2,300 globally, and we are part of Omnicom Group, which employs more than 70,000 worldwide. In many regards, we'd easily be categorized as "the whale." So, how can we push ourselves to remain nimble, creative, active, and prosperous?

It's a real challenge. Big companies often develop a sense of confidence that little fish will get caught in our wake even if we are not working too hard. But no matter what your company's size, unless you are constantly on a whale hunt, you will atrophy. Even if you are as successful as we are, even if you are ranked number one in your market globally, your competitors are "predator modeling"—they are plotting new ways and approaches to take you down. Figuratively and metaphorically, they view you as a whale, believing the odds are that you have become bloated, cumbersome, and slow, whereas they are lean, agile, and quick.

How do you retain your number-one position, and maintain the energy and momentum that helped you to grow, while more nimble and hungrier villagers are trying to take food off your table? Help your team realize that they shouldn't be waiting for another giant RFP to come over the transom? That you must continually hunt in order to eat? Changing that mind-set is a very significant culture issue, and whale hunting is right on target.

If that's true for a global marketing firm, how much more true might it be for your business? Whale hunting is how you gain or recapture the spirit of the hunt. *Whale Hunting* promotes a disciplined, unrelenting pursuit of advantage and growth. In the book, you learn that everybody in the company is a salesperson, all working in collaboration with others. "Sales" is not a dirty word—no matter what your role, it's okay and, in fact, essential to ask people to buy from you. If you don't ask for the order and the sale, someone else will.

The Whale Hunters understand how the economy has changed, especially with technology and consumer-controlled marketing. Consumers are in control of what they see, when they see it, how they see it, and how they buy.

We used to practice interruption-based marketing. Today's customers hate being interrupted. The whales—those customers whose potential deal is 10 to 20 times the size of your average deal—will hate to be interrupted. As a marketer, a salesperson, a CEO, you need to learn how to run alongside of them and create new ways for them to experience your brand and your promise. You have to understand differently. *Whale Hunting* will help you gain that understanding.

I'm very bullish about *Whale Hunting* because the business principles are illustrative in ways that others are not. Many books about sales are esoteric and irrelevant, but *Whale Hunting* is rooted in basic business principles. Through a brilliant metaphor, *Whale Hunting* presents core principles of Business 101 in a new and engaging fashion. These principles include:

- Pay attention.
- Prepare.
- Go on the hunt.
- Assign everyone a role.
- Take the necessary time.
- Store up for the cold spells.
- Let no one take food off your table.

When I talk to people in business, I speak in analogous ways because, in my opinion, an analogy is very powerful and easily understood. I'm a Yankees fan, yet the 2007 team is composed of great individual contributors who are all waiting for the big pitch;

they are not getting on base, manufacturing runs, stealing bases, playing the numbers game that says on-base percentages correlate with wins. While they wait for the chance to do magic, their competitors take deliberate, disciplined approaches to run production. And the Yankees lose, despite their awesome talent.

My point is that, attitudinally, it all ties in with business. You can't wait for the big pitch. You need to manufacture every run. That's what *Whale Hunting* is about—systematically and repeatedly developing a sales process that's as replicable as advanced manufacturing. If you understand that need, this book will resonate for you as it resonates with business owners, leaders, marketers, and sales teams.

The only other author I know who has achieved this is Malcolm Gladwell, in *Blink*. *Whale Hunting* is Gladwell-esque, providing more fundamentals than theory. Searcy and Smith are smart people who think about business the way I do. Their method has helped dozens of small to midsize businesses achieve extraordinary growth in relatively short periods of time. And I can attest to its appeal for big companies as well.

Whoever you are, whatever your business, you are not too small or too big to improve your sales productivity through the lessons in *Whale Hunting*. Buy this book, read it, implement its lessons. You will make whale hunting a way of life.

James Lyons, President, North America
Rapp Collins Worldwide
Full-service, direct marketing agency with
50 offices in 30 countries

Preface

WHALE HUNTING. The name itself conjures up images of whales breaching in icy seas, harpoons slicing through the frosty nighttime air, and groups of people, clothed in massive furs, huddled along the shore waiting for the hunters' glorious return. How do such images relate to rapid business growth?

Directly and powerfully.

Ever since Tom visited an Inuit museum in the northwestern United States, we've been exploring the analogy between whale hunting and business growth. In the process, we've learned a great deal about the remarkable whale hunting processes of the Inuit people of northwest Alaska. At a turning point in their history—born perhaps of desperate need or of opportunities made possible by new tools, skills, and knowledge—the Inuit ceased to wait patiently for the occasional whale to beach itself during the spring migration. They ceased to be satisfied with a diet of fish or seals or the occasional caribou. Rather, they set out to hunt whales—deliberately, strategically, and mindfully, utilizing every resource that their village

could offer. We believe they did so because while a smaller catch might feed one family for a week, a whale would feed the village for a year.

In our lexicon, *a whale is a very big deal, 10 to 20 times larger than your average deal, typically with a company that is bigger than yours.* *Whale Hunting* is about small to midsized companies accelerating—even exploding—their growth by learning to sell and to service whale-sized deals as a matter of routine rather than as an occasional exception.

Our continuing study of Inuit whale hunting methods, coupled with Tom's experience in rapid business development and Barbara's background in culture change, inspired a sales process model that we have implemented successfully within many small and midsize companies, some of whose experiences we share in the chapters to follow. We have also worked with independent sales professionals and the sales organizations of large companies.

The Inuit approached a whale in a small boat, manned by small crews, far from land and safety. If they could land a whale, their families and villages would thrive. But if they failed, the people might well starve during an upcoming bitter winter as a consequence of a single unsuccessful hunting season.

We have developed a process for whale hunting derived from and illustrated by those ancient ways and enhanced by our more contemporary experiences. In this book, we elaborate the methods Inuit used to scout, hunt, and harvest their whales. We identify and explain nine phases of the whale hunt, in each phase relating the Inuit practice to modern business. Our purpose is to explain how you can help your company repeatedly land and service those big

deals that transform your business, no matter what your role in management, sales, operations, or customer service.

You know intuitively that successfully hunting a new whale-sized account may bring greater prosperity and stability to your company. In making that hunt, however, you also know the risk of humiliation and hunger if the hunt fails. Yet like the Inuit, you accept the burden of producing a harvest sufficient to sustain your village for the seasons to come.

We have come to know, respect, and appreciate the Inuit and their wisdom. The Inuit's reverence for the whale has profoundly influenced our thinking. To equate a whale with an exceptionally large account, as we do, is to see the analogy dissipate if, at the end of the story, the whale is dead. But we discovered in the Inuit belief system some important understandings about the whale, the village, and the gods who oversee and bless the transactions. Most importantly, the whale was not prey; rather, it was a treasured gift from the gods to ensure the survival of the village. When the villagers respectfully preserved the whale's head and returned that head to the sea, they believed that the whale would be reborn.

Whale hunting is not a parable or a fairy tale. It is the true story of how people of indomitable spirit set out with rudimentary tools to capture the largest creature on earth to ensure that their village survived and thrived.

Join us now as we embark on a whale hunt. You and your company will never be the same. We guarantee it.

Tom Searcy and Barbara Weaver Smith
Founders, The Whale Hunters®
Indianapolis, Indiana

Acknowledgments

YOU DON'T HUNT WHALES ALONE. And you don't bring books to life alone, either. As you will read, the last phase of whale hunting is to celebrate—not yourself, but the whale. We celebrate the determination, energy, and unfailing good humor of our colleagues, our customers, and our publishing team:

Bob Bonebrake, part-time whale hunter, who translated our vision into words the first time around.

The *Whale Hunters* writing team: Dr. Wynola Richards, Tim Searcy, and Don Searcy, for their contributions to whale hunting content, editorial advice, and case study write-ups.

Our subject matter experts, the extraordinary men and women who have engaged us in their business growth and who have graciously assisted us in writing about their hunts: Jack Burns, SGI; Wil Davis and Don Engel, Ontario Systems; Dan Delfino, Power Direct; Cathy Langham, Langham Logistics, Inc.; Dan Liotti, Midwest Mole; Chip McLean, Six Disciplines Leadership Center of Central Indiana; Kingdon Offenbacker, Echo Supply; Kathy

Reehling, Crew Technical Services; Rob Simmons and Rebecca Bush, Machine Specialties; Steve Walker, Walker Information; Patricia White, WorkPlace Media.

Keith McFarland, founder of McFarland Strategy Partners, who introduced us into the publishing world.

Esmond Harmsworth, world-class agent, who believed in our story and encouraged us to tell it straight; Laurie Harting, acquisitions editor, who turned a manuscript into a book; Dave Cedrone, illustrator.

Our mentors: Dan Sullivan, founder and CEO of the Strategic Coach, Inc.; Al Paison, founder of Loyalty Research and chair of an Indianapolis TEC/Vistage group; Dr. Tom Hill, founder of the Eagle Institute.

And to the many harpooners, shamans, and subject matter experts from our client companies who have helped us bring whale hunting to life through their enthusiasm to learn our process, their exuberant critique, and their grace under the pressure of sales complexity and rapid business growth.

Author Biographies

TOM SEARCY IS A NATIONALLY recognized expert and leading authority on fast-growth companies and large account sales. By the time he had turned 40, Tom had driven meteoric growth for four companies, skyrocketing their annual revenues from \$15 million to \$100-plus million—and, in all four cases, successful IPOs. Among these is Transcom, an international customer relationship management company with operations worldwide, for which Tom served as president and CEO. There, he engineered the fastest start-up in teleservices industry history, and in the process, earned a top-10 ranking among teleservices organizations globally and a Gold Award for Quality.

All told, Tom Searcy has commandeered over \$2 billion in new business for his clients and other companies using The Whale Hunters Process™, orchestrating and closing sales to such whale-sized customers as AT&T, AOL, BMG, Disney, Sprint, UPS, Xerox, and many more.

Building on this dynamic history of managing and facilitating quick and massive growth, Tom founded The Whale Hunters to bring to fast-growing companies his intimate knowledge of the methods that can be used to land and harvest deals that are 10 to 20 times greater than their current average deal.

Through The Whale Hunters, Tom has combined into one process his knowledge and understanding of industry growth, his mastery of the intricate relationships among sales and operations personnel, and his ability to generate solid and long-lasting growth for companies. Tom serves as key business strategist for The Whale Hunters.

Trusted advisor to businesses, academic institutions, and not-for-profits alike, Dr. Barbara Weaver Smith is the inventor of ACT-Five™, an organizational change management process based on a culture of collaboration rather than internal competition. A highly respected and seasoned leader, Barbara has used this process to manage more than 50 complex collaborative projects across sectors, successfully uniting such strange bedfellows as educators, economic developers, business executives, and foundation leaders to produce social benefit and economic impact. ACT-Five™ is the basis for culture change in The Whale Hunters Process™.

Barbara takes the lead in brand management, product creation, and event design for The Whale Hunters. She specializes in helping companies to develop the fast-growth culture that whale hunting demands. Barbara is also president of Smith Weaver Smith, a consulting and project management firm specializing in strategic planning and the management of complex joint ventures. She has been a successful entrepreneur/business owner for 12 years.

Prior to launching these two companies, Barbara served as president and CEO of the Indiana Humanities Council; and,

during 10 years at Ball State University, held dual appointments as professor of English and dean of the University College. She holds a PhD in English from Ball State University and is a graduate of the Institute for Educational Management at Harvard University and a master's level graduate of The Strategic Coach™.

1



The Whale Hunters' Story



COME WITH US TO A PLACE THAT is much darker, much colder, and much more dangerous than wherever you are right now. We are in the far Northwest, along the coast of Alaska, centuries ago. Imagine that along that coast you live in an earthen hut with your close family group of about 30 people. The hut is only 50 feet long and 20 feet wide. There are no windows and there are no doors. Only a