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Based on their unique selling methodology, Schachter and Cheatham provide a proven sales strategy to help any sales leader, manager, or professional. For sales leaders, their approach provides a path for transforming the sales organization. For sales managers, it describes how to inspire change in the behavior of salespeople. And for salespeople, it offers a new way of selling that will have a dramatic impact on their performance. For any business executive, Selling Vision provides a faster path to driving change.
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Chapter 1

Time for Change

The Moment of Clarity

You have built a beautiful business. But lately, waves of change are slowly eroding its base. Until now you have held back the damage by reinforcing the foundation. Then one day the realization hits you: you must move the whole structure, or it will be swept away, like a sandcastle on the beach.

For so many of us, that is precisely how it feels when the market for what our company sells stops growing. Or when a newly emerged competitor (who seemed like an irrelevant gnat just a year ago) releases an offering that is beginning to transform the marketplace. Advances in technology are making new products possible or making it cheaper to produce the old products.

Sometimes the trouble occurs because our customers are changing. The customers may be confronting a shock in their own market (e.g., contractions in electronics retailing, fluctuating oil prices) and are less able to make their traditional purchases. Or the customers’ buying behaviors are changing. Often
what is changing is who is doing the buying within each customer organization. New buyers bring different purchasing criteria with them.

The drivers of change can also be positive. A new, more attractive segment of customers might be emerging. Our colleagues in engineering or product development may be ready to release some major innovations. We may have discovered that a few of our salespeople have become very successful selling in a different way, or to different buyers, or to different types of companies.

Whatever the cause, the moment will come. How you respond will determine your personal success, that of your customers, and to a great extent that of your company.

It’s pretty common to confront changes like those above and deny them, at least initially. Successful selling requires a great deal of optimism, so too often sellers and sales leaders dismiss early signs of the need to change as unnecessary negativity. Optimism alone, many sales leaders facing change believe, will win the day. But in this case optimism is just another word for denial. While it’s natural to be in that space for a while, too much time there, or too much commitment to past success, can be deadly.

“Creative Destruction”

It’s not so easy to be great forever. By most accounts, only 2 of the 11 companies cited by Jim Collins in Good to Great are still “great” today. Using another measure, the length of time that a corporation spends in the S&P 500 has dropped from 61 years in 1958 to just 18 years today. Richard Foster and Sarah Kaplan, in Creative Destruction, explain that the companies that perform
best over a 10- to 15-year period typically have strong cultures and meticulous bureaucracies. But it is exactly these qualities that make them stall out after that period.

Foster and Kaplan propose that success comes not from continuity but instead from discontinuity. They advocate the constant destruction and re-creation of companies to remain competitive. They argue that successful companies are those that are as dynamic as the market itself. Foster wrote in an earlier book that during periods of technological discontinuities, “Attackers, rather than defenders, have the economic advantage.” This is the situation we see so often today, where new entrants deploy new technologies to disrupt established markets. Legacy players are left facing the moment of clarity we described above.

High-performing salespeople often naturally figure out the right things to do in times of disruption; or because they are so skilled, they can get by for longer by ignoring the need for change. Low performers often become victims in times of change, blaming bad leadership, misguided efforts by other departments, and irrational customer demands. Fortunately, the core of most sales organizations is populated by optimists, but they often don’t know what to do when confronted by change and can easily fall into a state of denial.

Who is responsible for staying ahead of the market? Maybe it’s the R&D folks; maybe it should be owned by marketing and product development. You can argue that it’s the CEO’s responsibility. But here’s one thing that is true: the chief sales officer who takes responsibility for staying ahead of marketplace changes (rather than becoming a victim of them) is the CSO who will likely become a CEO.
That Sinking Feeling

The need for sales transformation is presenting itself in different ways to people, depending on their roles. Here is how the world looks today to three real sales professionals we have met (names and identifying details have been changed).

The Lost Edge

Jack has been selling for over 20 years. He has spent most of his career at two companies and has been successful at both. In fact, he quickly moved from key accounts to area sales manager. Within the region, the entire sales team was delighted to see one of their own, a guy that really gets it, in charge for a change. Today Jack is back in the selling role and struggling to meet his targets. What happened?

Jack failed at the sales manager role, as many successful salespeople do, because he was unable to provide meaningful direction to his team. He had good intentions, but he tried to get others to sell the way he had, which was somewhat unique, given his particular personality and experiences. For a while he was seen as a good manager because the person he replaced was not suited to the role, but eventually the numbers caught up with Jack. He was not able to lead his team to growth.

Jack was discouraged by the chain of events, and as we noted earlier, he is back as a salesperson and struggling. Is it because he’s been depressed by his recent experiences? Perhaps. But more likely, Jack’s failure at sales management and difficulty selling today is a result of falling out of sync with the changing marketplace.

Jack—like many other salespeople today—is feeling that he has lost his edge. The activities and behaviors that once worked
for him no longer get results. He is questioning whether he can be successful again.

**Back to Basics**

Joan is a sales manager. Her sales team, which is very experienced, has shown some improvement recently, but really it has continued to struggle since the global financial crisis many years ago. There has been very slight growth, but it has often come at the expense of margins.

Customers of Joan’s company, which we will call Allstar, have shown an increased resistance to Allstar’s pricing model. These customers are less interested than they once were in paying a premium, particularly given that newer competitors have similar offerings at lower prices.

Joan feels that the market has not really changed. She believes her team has become complacent, and even lazy. In response, she has pushed harder to drive and measure specific sales activities. She is focusing on five measures: call volume, meetings scheduled, opportunities identified, proposals submitted, and referrals generated. While this has had some positive impact on sales, it has also added a lot of noise to the CRM: leads that are not qualified, meetings that don’t drive sales, and opportunities that never close.

Joan knows there are people in her organization who are pushing for a major change in how Allstar goes to market. Joan tries to build consensus around the idea that no big change is necessary. She aligns herself with others opposed to change, and she shares examples of how any significant level of change would negatively impact her customers. In management meetings, Joan recommends that the sales organization stay focused on internal issues, such as conflicts with the marketing department, customer
service issues, and a quality problem in a recent product release. Fixing those, Joan argues, is the key to growth.

In summary, Joan believes that one more quarter is all she needs to prove that a big change is not necessary.

**Horror Show**

Helen has spent her whole career in the same organization and has been in her sales leader role for several years. As a salesperson, she had the fastest success of anyone in the history of the organization. She is well loved both by customers, who value her intelligence, and by her employees, who value her passion and compassion.

Helen recently had a moment of clarity. Her team just posted a year-over-year decline, a first in her career. While also feeling accountable to her company and boss, Helen’s primary reaction is one of having let the people on her team down. “They trusted me to make choices that protected their jobs,” Helen thinks to herself. “I’ve got to figure out a way to fix this.”

Helen finds it hard to put a finger on when the problems started. She isn’t sure what she missed. What she feels is a great deal of uncertainty. It feels like the wind has blown open a door in a horror movie. For an instant everyone can’t help but expect a serial killer on the other side. Helen tries to keep her emotions just this side of panic.

Helen knows she needs to fix the situation, but she does not know how.

**Taking the Bird’s-Eye View**

For Jack, Joan, and Helen, these are highly uncertain times, as they are for the salespeople, sales managers, and sales leaders they stand in for. Most sales professionals have been in the same
sticky situations as Jack, Joan, and Helen even if they haven’t held the exact same roles. How many of us have not:

- Feared losing the skills that made us successful in the past?
- Hoped that increased activity levels will overcome decreasing performance?
- Experienced feelings of panic when a major realization sets in?

For every sales role, and for every negative emotion above, there is an answer. That answer requires looking at the situation from a higher vantage point and seeing it in the context of larger waves of change that are washing over all markets today. By reconfiguring our response to marketplace change, we can quickly shift from being a victim or lost soul to being a leader.

**Charting the Course**

This book is a road map to staying ahead of marketplace change. For sales leaders, it provides a path for transforming the sales organization. For sales managers, it describes how to inspire change in the behavior of salespeople. And for salespeople, it offers a new way of selling that will have a dramatic impact on success. Whichever role you are in, this book will provide you with immediate actions you can take and experiments you can conduct to find the right direction for your future efforts.

This book is about sales. It is also about change management. In fact, in many respects, sales today is essentially change management.
The book is organized into five parts. In Part 1, we propose a new logic for thinking about and executing major change in sales organizations—what we will refer to as sales transformations. In Part 2, we examine sales transformations from the customer’s perspective, and we show how the customer’s changing buying patterns suggest a particular way of focusing a sales transformation and selling activity. In Part 3, we focus on the perspective of salespeople and what they can do to sell change to their customers who are also going through transformations. In Part 4, we look at how sales leaders and sales managers can change the way selling works in their organizations. Finally, in Part 5, we highlight the pivotal moments that determine the success of major change initiatives in sales organizations.
A number of books and papers have provided models for how companies’ go-to-market approaches must adapt to change. We propose a simple model, where a company is in a shift from selling a lot of X and a little bit of something new called Y . . . to a lot of Y and much less of the X legacy offering, as shown in Figure 2.1.

X and Y can be what you sell or how you sell. What you sell may be shifting to radically new products or to radically new services. How you sell may involve new types of customers, new types of buyers within existing customer organizations, or new, fundamentally different selling approaches.

More specifically, some examples of the shift from X to Y can be:

- A change from selling on-premise software to offering cloud solutions
A shift in pricing models from an approach that requires significant up-front payments to one that is based on monthly subscriptions

A change from selling equipment to leasing equipment

A need to move from selling print advertising to digital advertising

An effort to move salespeople from focusing on selling product features to selling the results the products will generate

A change from selling to technical buyers to selling to C-suite buyers

A shift from selling direct to selling through a channel (or the reverse)

A change from selling the value of product features to selling the business impact of both products and ancillary services

Sometimes a new competitor introduces a Y offering into the X marketplace, and the big X players have no choice but to provide a Y alternative. This is what’s happened in the cloud space.
But it’s also happened to taxi companies, with the advent of Uber. Often though, companies figure out Y on their own, frequently in collaboration with one or more of their biggest customers.

Initially a company is selling a lot of X and a little bit of Y. It looks like the pie chart in Figure 2.2, if you were to measure revenue or volume.

![Figure 2.2](image)

**Figure 2.2** Y represents a small share of revenue or volume.

Over time, if the strategy works, the idea is that the share of Y gets bigger. The progression looks something like that shown in Figure 2.3.

![Figure 2.3](image)

**Figure 2.3** The share of revenue or volume from Y gets bigger.

As you can see, at the end, there comes a point when Y is no longer the new thing. Z emerges, and the process repeats itself.

### What People Think Happens

Now let’s look at how salespeople change as a result of a shift from selling X to selling Y. This is where it gets interesting. Let’s start with what people think happens.
In the beginning, as shown in Figure 2.4, we have a few people selling Y, while most people are selling X. The diagram represents a normal distribution curve, showing the number of salespeople doing each type of selling.

Figure 2.4  In the beginning, there are just a few salespeople selling Y.

Then, the conventional wisdom says, over time you get more of your X salespeople to sell Y. This is usually where the hard work occurs, but with success, over time the progression is expected to look more like that shown in Figure 2.5. In time, as the figure shows, more and more salespeople sell Y. And at the end, before the cycle repeats, some of them start to sell Z.

Based on this model, sales leaders see it as their job to get more salespeople to sell Y more quickly. And that is hard. People resist change, especially big change. Typically, most salespeople who are told (or even taught) to start selling Y revert fairly quickly to selling X, as they always did. Sales leaders become frustrated by their inability to drive the shift they need. They often begin to wonder if they need new salespeople. They initiate an effort to recruit Y salespeople, often at great expense, and begin to let go X salespeople who can’t make the shift to Y, which is also expensive.

Salespeople can be tremendously frustrated. Often executive discussions about a shift from X to Y can take months. Once a decision is reached, the leaders, who have had a significant period of time to consider and accept the change, now expect
salespeople to commit to it fully as soon as it is announced. Typically, salespeople, who have heard many big announcements over the years, wait things out to see if the change will stick, since so many before it have not.

Sales managers are often stuck in the middle between sales representatives who resist the change from X to Y and executives who insist upon it. The sales managers, themselves, often have mixed feelings about the new approach and are torn between being candid about their doubts and feeling an obligation to display confidence about the new direction.
There is a better way. Sales professionals who find themselves in this situation will benefit from looking at the situation differently.

**What Really Happens**

Driving a sales transformation—or even just being part of one—gets a whole lot easier when you realize the model above is not accurate. The shift from selling X to selling Y does not occur that way. It’s not a binary event, where you turn off X and turn on Y. Thinking it’s like a switch is what creates frustration for so many sales leaders and what creates resistance from salespeople and confusion in sales managers.

Let’s look again at how salespeople change as a result of a shift from selling X to selling Y. What really happens is that in the beginning, as shown in Figure 2.6, we have a very few people selling purely Y, while most people are selling X, and a few are selling a combination we’ll refer to as XY. That is, they are continuing to sell X while also selling Y. That is what happens in real life.

There will always be a few pure Y sellers (often new to the organization, sometimes from another firm that sold purely Y, or perhaps part of the original effort to introduce Y), but most people selling Y will still be selling a fair amount of X too. The salespeople are sometimes selling both X and Y at the same time; sometimes they are selling to their customers a combination solution that includes both X and Y.

The recognition of the XY combination is the key to understanding sales transformation. Over time, as you see on the
distribution curves in Figure 2.6, salespeople do shift to selling Y exclusively. But they only do that after a period of selling both X and Y simultaneously.

The most critical element of making a sales transformation successful is describing what it looks like to sell X and Y at the same time or to sell XY combinations. It is not, as most sales leaders wrongly assume today, simply defining Y and how to sell it. Nor is it getting people to switch from X to Y. The key is
getting them to switch from selling only X to selling X and Y at the same time.

In our experience, Stage 2 is the critical moment that determines success or failure. Here’s why:

- In Stage 1, you have a few of the original pure-Y sellers, and you have some XY sellers, who have likely figured out on their own how to sell both ways at once or combinations. These are typically some of your best salespeople who are also agile and always looking for the next new thing. They don’t need much guidance. They figure out what works and adopt new approaches quickly, as long as they see genuinely positive reactions from customers.

- In Stage 2, you actually have to work to get X sellers (the majority of your historically successful salespeople) to adopt the XY selling approach. That is hard, and it’s made harder by trying to get X salespeople to sell Y. We have worked with dozens of the largest and most admired sales forces in the world as they execute sales transformations. What we have discovered is that instead of driving X salespeople to sell Y, what successful sales leaders do is get X salespeople to begin selling XY. Later, we’ll go deeper into exactly how to do that. But if you don’t get Stage 2 right, you won’t see the later stages. You’ll likely be looking for a new job. If you do get Stage 2 right, the later stages will take care of themselves, to a great extent.

As we go forward in our discussions, we’ll talk about the difference between two ways of seeing sales transformation:
The Traditional Approach:

\[ X \rightarrow Y \]

The Selling Vision Approach:

\[ X \rightarrow XY \rightarrow Y \]

Table 2.1 provides an easy way to see how we will use these terms throughout this book.

<table>
<thead>
<tr>
<th>Reference</th>
<th>What it means</th>
</tr>
</thead>
<tbody>
<tr>
<td>( X )</td>
<td>What you have been selling—or how you have been selling.</td>
</tr>
<tr>
<td>( Y )</td>
<td>What you want to be selling—or how you want to be selling—in the future.</td>
</tr>
<tr>
<td>( XY )</td>
<td>Selling both ( X ) and ( Y ) at the same time, either simultaneously or in combination.</td>
</tr>
<tr>
<td>( X\text{-to-}Y )</td>
<td>A change from selling ( X ) to selling ( Y ).</td>
</tr>
<tr>
<td>( X \rightarrow Y )</td>
<td>A change from selling ( X ) directly to selling ( Y ) without an intended ( XY ) period.</td>
</tr>
<tr>
<td>( X \rightarrow XY \rightarrow Y )</td>
<td>A change from selling ( X ) to selling ( Y ), but with a clearly defined period in which you are selling both ( X ) and ( Y ).</td>
</tr>
</tbody>
</table>

*Table 2.1 Terminology*
About the Authors

Lou Schachter leads the Global BTS Sales Practice, a team of 50 around the world, and drives research and intellectual property development. He works with clients such as Salesforce.com, Toyota, Citizens Bank, and Schindler, building great sales forces through innovative customer engagement models and helping leaders, managers, and sellers see sales behaviors from the customer’s point of view. His deep global experience gives him the ability to help leaders shape their sales forces in markets all over the world.

He is passionate about moving the science of sales to the next level, looking for unconventional wisdom and challenging common sense that has become outdated. Lou is a true student of sales and all that has been written on it over the years.

Before joining the BTS team, Lou had a long career in sales for professional services firms. His experience includes selling to Fortune 500 companies, small businesses, and large government institutions. He also helped lead the fast growth of a specialized communications firm. Earlier in his career, he was an investment banker.

Lou is the coauthor of the book The Mind of the Customer: How the World’s Leading Sales Forces Accelerate Their Customers’ Success, which was published by McGraw-Hill in 2006.
Lou graduated from the Wharton School of the University of Pennsylvania. When not on airplanes, he lives in Los Angeles, with his partner, Wayne.

**Rick Cheatham** leads the U.S. Sales Practice for BTS. He works with clients such as Google, Accenture, Metlife, and IBM to drive their sales efforts into the future. Rick leads a team of over 20 consultants and conceptualizes many of the BTS solutions deployed in the United States.

He is passionate about making work a place that salespeople come to be successful, is totally pragmatic and experienced in getting results through being a purpose-driven leader, and is able to maintain an uncommon balance between vision and how things really get done.

Prior to coming to BTS, Rick was a sales leader for both regional and global account teams. Ultimately he led the sales force of a $1 billion business unit through a restructuring and shift in how they sold. That experience has shaped his thinking on how organizations can change what and how they sell faster and more effectively.

Rick lives in Austin with his wife, Jen, and four kids.
About BTS

The BTS Sales Practice partners with the most successful sales forces in the world, providing consulting, training, and technology to give salespeople the experiences and skills they need to do the best work of their lives. The BTS approach combines proprietary global sales research, clients’ organizational wisdom, and insights uncovered together, to design simulations and training that are executed upon in the field using on-the-job tools.

BTS is a global professional services firm headquartered in Stockholm, Sweden, with some 450 professionals in 32 offices located on 6 continents. Among the clients of the BTS Sales Practice are Autodesk, BBVA Bancomer, BlueScope Steel, Chevron, Cisco, Ericsson, Google, Hewlett-Packard, IBM, Johnson & Johnson, KPMG, Microsoft, Nike, Oracle, Pfizer, Salesforce.com, SAP, Schindler, Sodexo, Standard Bank, Toyota, Twitter, UCB, UPS, and VMware.