Salesperson as Navigator

By Lou Schachter and Rick Cheatham
About BTS

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We serve a wide range of strategy execution and talent development needs. Our services span the employee lifecycle from assessment centers for talent selection and development to strategy alignment and execution initiatives, and from business acumen, leadership and sales training programs to on-the-job business simulations and application tools. We partner with nearly 450 organizations, including over 30 of the world’s 100 largest global corporations. Our major clients are some of the most respected names in business: AT&T, Chevron, Coca-Cola, Ericsson, Google, GSK, HP, HSBC, Salesforce.com, Telstra, and Unilever.

BTS is a public company listed on the Nasdaq OMX Stockholm exchange and trades under the symbol BTS B.

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About the Authors

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The research project that provides the data for this report is led by Eduardo Umanzor Ph.D, the Director of Design and Innovation for the Sales Practice at BTS. Eduardo has 20 years of experience in sales, sales management, training and performance improvement.
The Paradox of Choice

We've all been there: staring blankly at a vast display of televisions inside a consumer electronics store. So many choices! Are there meaningful differences? Which is the right one for me? How do I get the most value for my money? How do I make the right decision? Will I make the right decision? Looking at web reviews on my phone, it's impossible to determine the best option for me. Maybe it's just easier to go home and deal with this another time.

This quandary is not just a situation in which consumers find themselves. Businesses face the same circumstances every day. Even for major purchases, businesses today are confronting an unexpected wealth of choices. From the point of view of the various sellers offering their products and services to the company, there may be important differentiators and multiple levels of value. But to the people in the company making the buying decision, the choice can feel much the same as the consumer facing that wall of televisions.

As salespeople, we often think of ourselves presenting a great product or solution to the customer. But customers see this completely differently. They see too many choices without clear differentiators. At some point it becomes easiest to just make a choice based on price. No one will question that.
What Selling Looks Like to Salespeople

What Buying Looks Like to Customers
But new research BTS has conducted with 285 executive-level buyers globally shows that customers do not want to make their purchase decision just based on price. What they want are salespeople who will help them make the right choice that maximizes the overall value equation.

Constant change and uncertainty have exhausted buyers; the global economy has made every major purchasing decision seem like life or death. Customers today need salespeople to help reduce complexity and guide them through the chaos. While this relationship requires trust, trust alone isn’t enough. Customers want help narrowing down the options and making the right buying decision.

That is why BTS thinks it is time to move beyond the concept of becoming the customer’s trusted advisor. The idea of becoming a trusted advisor is about building the right customer relationship defined by credibility, reliability and intimacy, all with a focus on the customer rather than the salesperson. While still true today, it lacks a critical component that customers now expect from salespeople.

Much has been written in recent years about the need for salespeople to provoke or challenge their customers. There’s a lot of truth to that within the trusted advisor concept, particularly when it’s done with genuine humility and curiosity rather than arrogance and condescension. But our research suggests that’s only a piece of the pie, not the entire pie.

What customers today want is a navigator. They have a destination in mind. Typically, that destination is defined by the business goals they want to achieve and the targets they need to hit. They may or may not know on the best path to take, but they will engage with someone they believe will guide them toward that destination. They seek salespeople who understand their industry terrain, can chart new trails based on their individual priorities, and know when to take a shortcut and when it is best to take the long way around. In this view, a salesperson is a navigator.
How to Be a Navigator

Think about what navigators provide on a journey. They have a clear understanding of the desired destination. They know where you want to go. And they have been to that destination before. In fact, they are experts on the multiple ways of getting to that destination. Good navigators know where obstacles lay along the path as well as how to avoid them. They know where the shortcuts exist. More than that, they are also calm and in control, with a clear and compelling vision of how the journey will go.

What does this mean for salespeople? How can you become a navigator?

Becoming a Navigator

1. Clarify the Destination
2. Recommend the Path
3. Measure Progress
Navigation Step 1:

Clarify the Destination

First, you have to gain a full understanding of the customer's intended destination. That destination can be thought of as the customer's desired result and can be communicated by the customer in multiple ways:

- Vision of success
- Goals
- Metrics or Key Performance Indicators (KPIs)

Becoming an expert on the customer's desired result means two things: (1) asking the right questions, and (2) having sufficient business acumen to understand the answers. It's one thing to learn that the customer wants to improve inventory turns. But it's something else to understand why, know what to ask next and know what to do. By showing you understand their destination and starting point holistically, and by making it clear that you are genuinely interested in their results, you begin to earn the right to become the customer’s navigator.

Navigation Step 2:

Recommend the Path

The second step for salespeople who want to be navigators is to offer expertise along the journey to the destination. That, too, begins with questions. Few customers are standing still, waiting for their journey to begin. Most have already begun the process. So the salesperson must ask questions about what they have done so far and where they have been. This includes topics such as:

- Current strategic initiatives
- Marketplace trends they are leveraging
- Innovations and improvements they are making
Some of the greatest value salespeople have is something that most salespeople don’t even recognize: their awareness of how other similar companies are executing. Providing expertise on the journey involves sharing insights about what other companies have discovered along the way. That doesn’t mean sharing anything that is proprietary to those companies, but it does mean saying things like, “Typically, when companies shift their servers to the cloud, they take one of three approaches. Here are the benefits and disadvantages of each approach....”

This is also the time to challenge traditional thinking and offer insights. Many times, great salespeople can highlight what the customer sees as constraints but are actually self-imposed limitations. The salesperson can recommend alternative paths to success that the customer, who is just too close to the day-to-day realities, cannot see. The key to doing this in a way that the customer will appreciate is to be humble: Ask questions, offer hypotheses, show empathy.

Next, the salesperson has to recommend a path. The path should incorporate what the company is already doing and include the steps it should take to get to its results faster. This is when the salesperson begins to talk about products and services. In complex sales, we often recommend that no products or services are discussed in the first two interactions. The first interaction is all about understanding the customer’s desired destination. The second is about the route options. In the third, the salesperson can offer a recommended path—a proposal.

The proposal should lay out the from-to journey and include options. It must indicate what the likely results will be. That is, it must describe the destination. And it must describe how progress to the destination will be measured.
Navigation Step 3:

Measure Progress

Our recent white paper “Closing the Value Gap” explains how customers today will buy more and at higher prices if by doing so they will genuinely accelerate the achievement of their desired business results. What salespeople often fail to do is to demonstrate progress on the metrics that customers care about. So the journey must include a way of measuring progress on those metrics.

In many situations, the salesperson disappears once the sale is closed, handing off the “service” aspect to others in their company. And while the implementation of the purchase almost inevitably requires such a handoff, the best salespeople do not disappear. As customer navigators, they know they must be present at key points throughout the implementation process. Their main role during this stage is to help the customer interpret the progress being made, as well as ensure that any obstacles impeding progress are removed. When progress against the metrics is measured consistently, and the original promises from the sales process are being met, salespeople are setting up their next sales. They are uncovering new needs and building trust that they are the right partners.

The right way to navigate at this stage is to assume responsibility for measuring and reporting progress on the journey. That process starts with working collaboratively with customers to determine the metrics to be measured. This is best done during the sales process, incorporated into the proposal and confirmed at regular intervals. These steps are hugely valuable in creating differentiation between salespeople who are committed to fulfilling customers’ desired business results, and those who are simply there to solve a problem or fill a product need. Salespeople should also guide their customers to the best measurement techniques. When they take the lead in preparing the periodic measurement reports, salespeople reinforce their roles as true partners in their customers’ desired outcomes.

The converse of this situation happens all too frequently: During the implementation, a customer stakeholder challenges the value being created, and without clear measures of progress, doubt begins to infuse the customer organization.
The Navigator Salesperson

When a salesperson acts as a navigator, everyone benefits: The customer gets to the desired destination (or results) faster. The selling company gets paid not only for its products or services, but for the added value its salesperson provides by guiding the customer through the implementation process, and for demonstrable, clearly measured results. And the salesperson benefits by deepening the relationship with the customer and becoming an essential partner on the customer’s journey.

What does this mean for how companies recruit and select salespeople and promote others into sales positions? How can sales managers identify candidates who will be the most likely to succeed as navigators for their customers?

What to Look For

At BTS, we have been conducting research for the last year on the knowledge, behaviors and personal attributes critical to success in sales in today’s environment. While knowledge and behaviors can be trained, personal attributes cannot. However, you can select for them. And our initial findings suggest the following critical attributes of navigator salespeople:
• **Proactivity**: You are looking for people eager to be at the front of the pack, leading the way. That means passivity and hesitation are deal-breakers. Ask about situations in which they were part of a group that faced a complex challenge, and explore their role in guiding the team forward in uncertain waters.

• **Accountability**: Ask about how the candidate sets and accomplishes goals. Do they own the goal or do they feel a target was handed to them? Identify situations in which the candidate was part of something that went wrong. What language do they use to describe the mistakes? Do they take ownership for the outcome and their contribution?

• **Curiosity**: No amount of questioning skills training can substitute for natural curiosity. If the candidate comes from outside your company, what kind of research have they done? What questions are they asking about your business? Are they curious about your company’s goals and your personal interests and objectives? Or are their questions focused largely on their potential role and their own needs?

• **Honesty/Integrity**: You cannot afford, and your customers do not want, someone who takes ethical shortcuts or is willing to mislead others to accomplish their objectives. If the customer does not trust the salesperson, there is no opportunity for the salesperson to act as a navigator. Ask the candidate to describe difficult ethical situations they have encountered. What did they take into account in choosing how to proceed? Looking at the candidate’s experience and what he or she tells you, what does your gut say? Do you have any doubts about this person’s integrity?

• **Tenacity**: Look for people who persevere through difficult circumstances. True navigators cannot give up (or freeze up) when they encounter trouble. Trouble is a given on any complex journey. Find out about unexpected situations the candidate has run into on the path to accomplishing a goal and how they responded.
You are looking for curious people who can listen and then quickly articulate a compelling vision that customers will follow. Being more intentional about the kind of salesperson you are looking for can yield big results. The sales leaders we have interviewed recently indicate they are significantly changing the way they select new salespeople, based on the attributes they see as requirements in the new market environment.

**How to Develop Navigators**

There is a fairly specific set of knowledge and behaviors required to be a successful navigator. Required knowledge starts with business acumen. That can come from industry experience (particularly in the customers’ industry), from training, from learning on the job, or from educational background. Without business acumen, the salesperson cannot fully appreciate the customer’s business context and the results they are executing toward.

**Knowledge**

Business acumen is the foundation that drives several types of knowledge that customers in our research tell us are critical today:

- Knowledge of the customer’s business
- Knowledge of the customer’s industry
- Knowledge of the salesperson’s own company

To be a navigator, the salesperson must also have the product and technical knowledge required to define the customer journey – what they will do or deploy to accomplish their objectives.
Behaviors

We have identified seven behaviors critical to selling in today’s environment:

- **Demonstrating** customer understanding: *Navigators show they understand the customer’s situation and priorities at the beginning of the journey.*

- **Planning** before each customer interaction: *Navigators are ready with insights, suggestions, and alternatives.*

- **Discovering** what customers value: *Navigators ask questions that clarify where the customer wants to go.*

- **Engaging** customers by articulating the value of your offerings: *Navigators link the products and services they sell to the metrics and initiatives the customer cares about most.*

- **Advancing** the sale forward at every stage of the customer’s buying process: *Navigators take responsibility for incrementally moving the customer forward in their buying decisions.*

- **Managing** your overall book of business and each account and opportunity: *Navigators align their account and opportunity plans with what the customer is trying to accomplish, not just with their own targets.*

- **Collaborating** with others in your organization on behalf of your customers: *Navigators know they don’t themselves have all the answers. They see their role as involving others in their organizations to help the customer accomplish all they need to on their journey.*
The good news is the seven behaviors can all be taught. Now, here’s the bad news: Our research shows a significant gap on all seven behaviors between what customers want from their salespeople and what they receive. As described in our recent white paper “Closing the Value Gap”, the data suggests that 84 percent of customers who prefer to be sold to in a way that accelerates their overall business results are instead being sold to in a way that is focused on products and problems.

Too much of today’s sales training is locked in a legacy worldview that no longer is relevant. While sales managers seek to inculcate new reps with the training concepts they once learned, many of those concepts have shrinking relevance today. Training people to “handle objections,” “identify champions” and “find pain” (just a few examples) does not provide reps with the skills they need to be navigators and to demonstrate the behaviors that customers seek today.
A Broader Need for Navigators

Customers want salespeople who can navigate for them on their buying and implementation journeys. Sales forces that can develop cadres of navigators will have an advantage in today’s turbulent selling environment. But there is another reason to create navigators. The challenges that sales managers face today in leading their teams also speak to a need for navigation. In a future white paper, we will explore how the concepts of navigation can be used by sales managers to drive better execution in their teams – again, by clarifying the destination, recommending the path, and measuring progress.
Need Help Planning Your Journey?

BTS is an execution consulting company, and we excel at helping your sales force build the alignment, mindset and capabilities needed to sell in a way that reflects what your customers want today. We have developed standard learning platforms that accelerate the ability of salespeople to become navigators for their customers, and we build highly custom learning platforms for salespeople and sales managers as well. All of our platforms leverage business simulations and other forms of experiential learning to drive knowledge acquisition and behavior change that lead directly to improved sales results.

Learn more at bts.com/sales-transformation. Or contact us online at www.bts.com/contact.aspx or by phone:

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