



# ‘Challenging for Sales [and Client] Success’

Delivered by: Nick Thomas  
June 2024



# Welcome and Thankyou

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Sixty-minute webinar format

Slides and Recording provided post-session. Chat and Q&A

## Nick Thomas

- Sector Sales and Sales Leadership specialist
- Widely qualified coach. Coaching, training and consulting – Insurance M&A

## Nick Thomas & Associates

- Up to the minute training solutions addressing the challenges of the modern insurance professional
- Technical insurance; sales, communication and soft skills; performance, resilience and health; management and leadership, customer service



# Today's Objectives/ Agenda

*'Begin with the end  
in mind'*

Stephen R. Covey,  
The 7 Habits of  
Highly Effective  
People'

- Understand the research [by CEB] on the behavioural characteristics of top performing salespeople and why they are key in a modern B2B solution selling environment
- Understand how we can adopt these behaviours to supercharge our own sales performance
- To consider some real life examples in your work

# Consultative Sales

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- *What is Consultative sales?*
- *What limitations might Consultative sales have?*



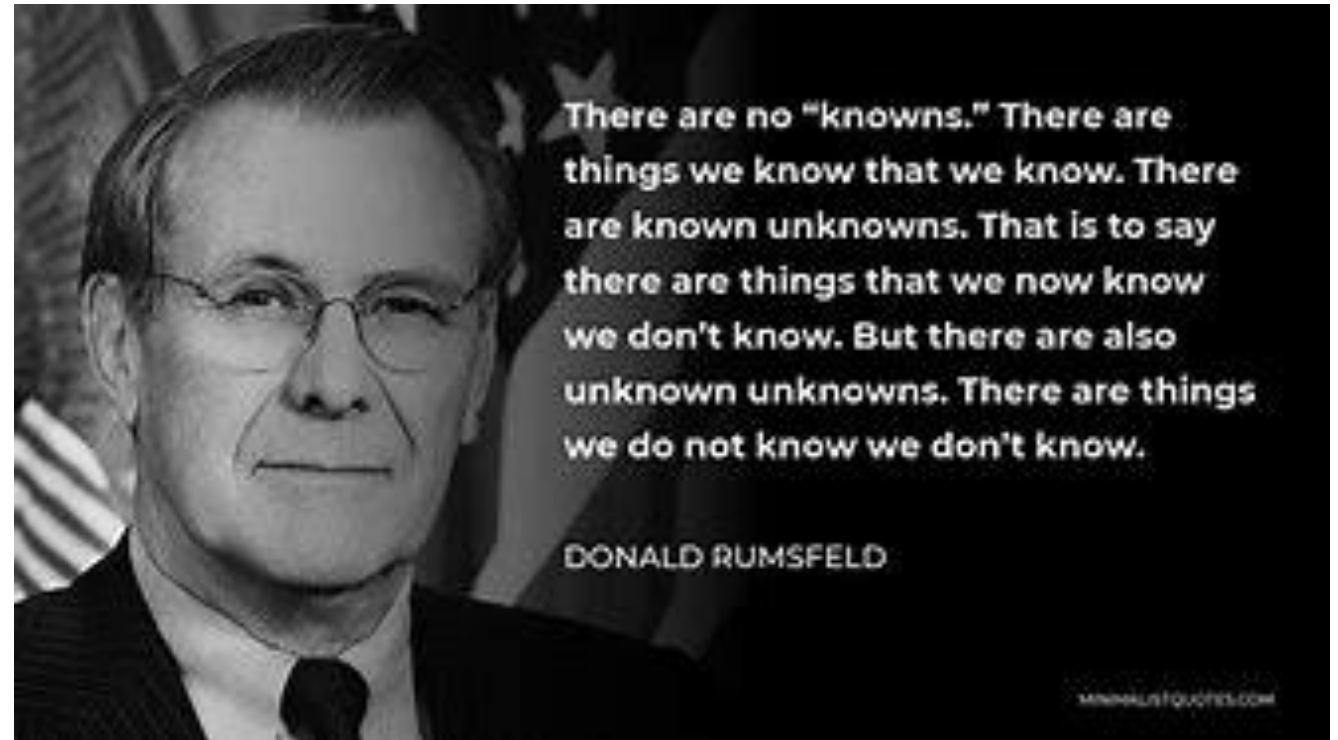
# Consultative sales

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## Definition:

*'A style of selling based on uncovering, understanding and responding to the customer's underlying business need through meaningful dialogue'*

**Gartner**



# B2B sales in the 2000s

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## CEB Research 2009 onwards

- Which skills, behaviours, knowledge and attitudes matter most for high performance?
- Assessed 44 different attributes
- Surveyed 6,000 sales managers across every major industry, sales model and geography
- Factor analysis – **rep characteristics tend to clump together into five distinct behavioral groups**

*'Staring directly into the teeth of the toughest sales environment in decades – if not ever – a small but uniquely gifted number of sales reps were selling. In fact, they were selling a lot. While others struggled to close even the smallest of deals, these individuals were bringing in the kind of business most reps could only dream of'*

**Dixon and Adamson, CEB**

# B2B sales in the 2000s

## The Five Profiles Of Sales Reps

### Hard Worker



- Always goes the extra mile
- Doesn't give up easily
- Self-motivated
- Interested in feedback and development

### Challenger



- Always has a different view of the world
- Understands the customer's business
- Loves to debate
- Pushes the customer

### Relationship Builder



- Builds strong customer advocates
- Generous in giving time to help others
- Gets along with everyone

### Lone Wolf



- Follows own instincts
- Self-assured
- Independent

### Problem Solver



- Reliably responds
- Ensures that all problems are solved
- Detail oriented

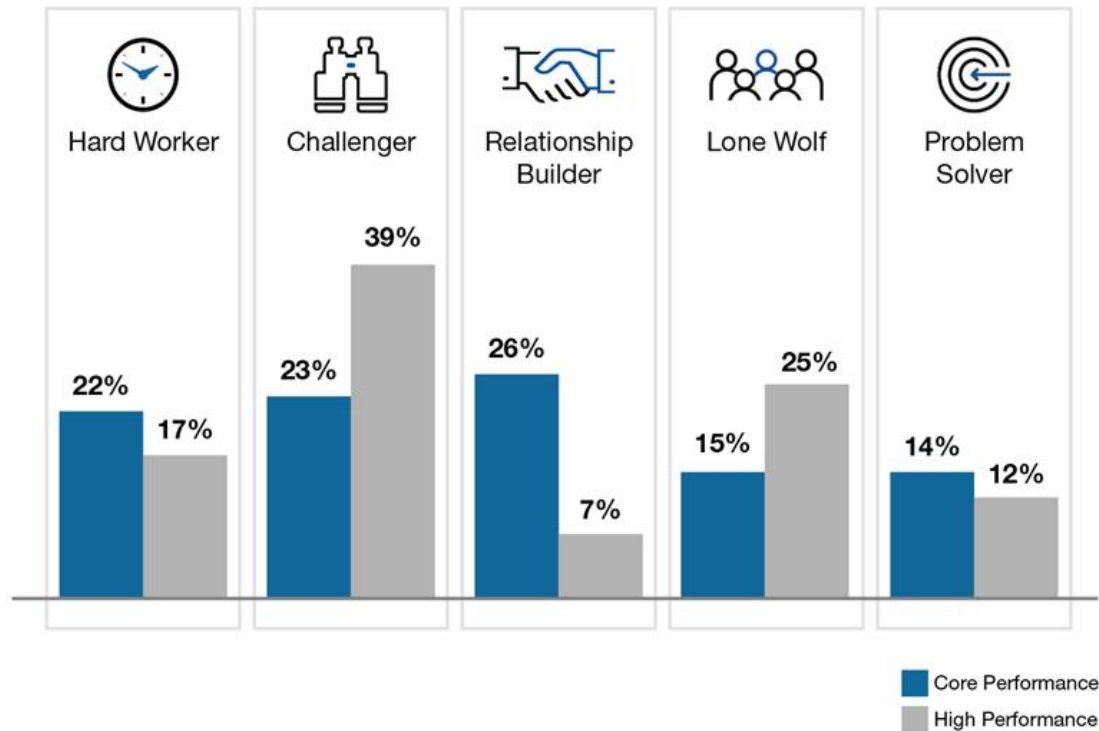


### Poll:

- *Which one are you?*
- *Who would you like to have on your team?*



## Percentage of Core versus High Performers Per Profile



[gartner.com/SmarterWithGartner](https://gartner.com/SmarterWithGartner)

n = 683.  
Source: Gartner

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## Sales Performance:

- One clear winner and one clear loser
- Fairly even distribution of core performers between profiles – no one way to be mediocre!
- **BUT nearly 40% of star performers are Challengers!**
- ...only 7% are Relationship Builders...
- *Q: Transactional sales...?*

*'...these results by no means suggest that customer relationships aren't important for sales – this would be a naïve conclusion. If your customers don't know who you are or worse, outright dislike you, you must fix that first'*  
**The Challenger Sale, Dixon and Adamson of CEB**



# The Challenger

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## Teach for Differentiation

- *unique perspective on customer business and*
- *ability to engage in robust two-way dialogue*

## Tailor for Resonance

- *right message to right person within organisation*
- *due to superior sense of customer economic and value drivers*

## Take Control of Sale

- *comfortable discussing money*
- *can press customer – assertive not aggressive*

*‘While the **Challenger** is focused on customer value, the **Relationship Builder** is more focused on customer convenience’*

*What if customers truly don’t know what they need? What if customers’ greatest single need – ironically – is to figure out exactly what they need?*

# Teaching for Differentiation

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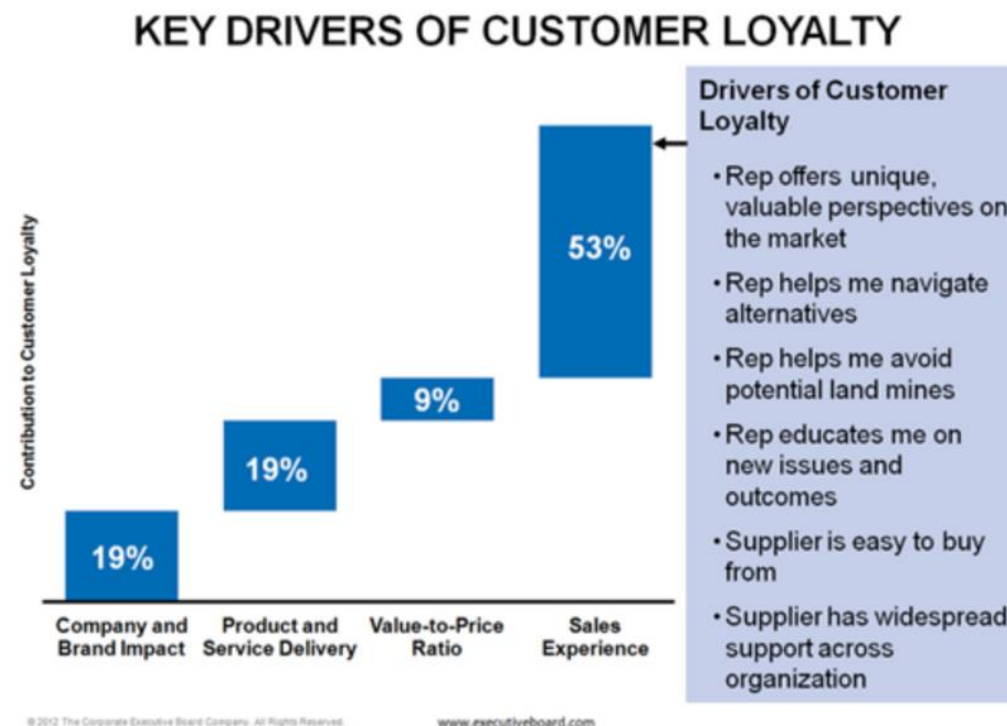
*Teaching is all about offering customers **unique perspectives** on their business and communicating those perspectives with passion and precision in a way that draws customers into the conversation. These new perspectives apply **not to your products and solutions** but to how the customer can compete more effectively in their market. It's insight **they can use to free up operating expenses, penetrate new markets or reduce risk***

**The Challenger Sale, Dixon and Adamson of CEB**

# Not what you sell but how

- 53% of customer loyalty is from the sales experience not product, service, brand etc.
- Top five factors in sales experience all show customer need to LEARN something not BUY something

Best salespeople win customer loyalty NOT by discovering what customers already know they need but by teaching them a new way of thinking altogether



Source: CEB Sales Leadership Council 2011

# Commercial Teaching

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- *What are your business' unique strengths?*
- *What do you do better than anyone else?*
- *Focus more on strengths little known/under-appreciated*



*Universal or specific client group  
[e.g., sector] perspective*

# Commercial Teaching

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## Lead to your unique strengths

– business for us not the competition!

- *Why should our customers buy from us over anyone else?*
- *What happens if we fail to differentiate? How does the customer choose?*



# Commercial Teaching

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**Now we know our unique strengths – design insights that challenge customers and lead towards strengths**

- Information or insight that reframes the way customers think about their business
- Need to know customer business better than them – as it pertains to your capabilities [lead to strengths]
- *‘I never thought about it that way before’ [vs ‘That’s exactly what I think!']*
- *Leads to ‘what else don’t I know?’*



# Commercial Teaching

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**Challenge customer assumptions -**  
*what information or insight can you bring that reframes the way customer think about their business?*

- *Offers unique and valuable perspectives on market*
- *Helps me navigate alternatives*
- *Ongoing advice and consultation*
- *Helps me avoid potential landmines*
- *Educates me on new issues and outcomes*





# Commercial Teaching

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**Scaling across customers –**  
tough to bring insight on prospect-  
to-prospect basis. *Better to scale  
segment by segment*

- *Build set of powerful insights and diagnostic questions to map to specific customers*
- *How do we segment? What basis?*



# Putting it all together – the prospect conversation

## 1] The Warmer

- Provide assessment of their key challenges
  - builds credibility
- What you are seeing at ‘similar’ companies
- Share anecdotes and data
- Check in with prospect – does this resonate, are there other challenges?

*‘If your reps’ primary goal going into a sales call is to “discover” the customer’s needs, you’ve lost the battle before you’ve even begun to fight because frankly your customers do not want to have that conversation’*

Dixon and Adamson, CEB

### Question:

- *How does this approach differ to consultative sales meetings?*
- *How is it similar?*

# Putting it all together – the prospect conversation

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## 2] The Reframe – game-changing insight

- You introduce the new perspective or insight – that connects the challenges to a bigger problem/opportunity they didn't appreciate
- Pre-prepared
- Surprises them – curious to know more

*You have shown them a different way to think, but why is it important to them....?*

*'If your reps' primary goal going into a sales call is to "discover" the customer's needs, you've lost the battle before you've even begun to fight because frankly your customers do not want to have that conversation'*

Dixon and Adamson, CEB

# Putting it all together – the prospect conversation

## 3] Specify and personalize potential impact of insight to them

- NOT for your solution, but for solving challenge!
- Data driven business case - make them squirm/drown - induce FUD factor
- Emotional impact...

### Question:

- *Why do we need to build emotional impact?*
- *How do we do it?*



# Putting it all together – the prospect conversation

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## 4] Introduce your capabilities as best means of acting on insight

- First – convince them of solution
- *‘That makes total sense – that’s what I need to do...’*
- *Then detail how you can deliver the solution better than anyone else – back to your unique strengths*
- *Data and storytelling*



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# Thank you! Questions?

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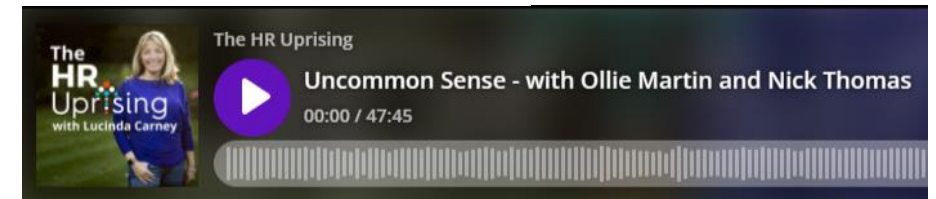
Email: [nick@nickthomasassociates.co.uk](mailto:nick@nickthomasassociates.co.uk)

Website: [www.nickthomasassociates.co.uk](http://www.nickthomasassociates.co.uk)

LinkedIn: <https://www.linkedin.com/in/nick-thomas-64046113/>

LinkedIn Company:  
<https://www.linkedin.com/company/nick-thomas-associates/>

*'Up to the minute training solutions addressing the challenges of the modern insurance professional'*

The logo for HR Uprising, with 'HR' in purple and 'Uprising' in a lighter purple, with a colorful dot matrix graphic above the 'i'.

[Click here](#) to listen to Nick's latest podcast appearance on 'HR Uprising' talking about workplace performance, resilience and health