



Where's Waldo? – Test & Review Opportunity Plans



I have been fortunate to have worked with many clients in the past 15 years in the discipline of Sales Effectiveness. Much of that work was done conducting various TAS Workshops; Target Account Selling, TAS Account Management etc...

I am often asked how many workshops I have conducted or how many sales teams I have trained and the answer is, I honestly can't remember. But working backwards from my early work in the 90's I can safely say the number of salespeople I have worked with face to face is in the

thousands. Working hands on with sales teams on the front lines has many advantages and I have learned many lessons that I now share with current clients. My other passion is *High Performance Work Systems* once described by a colleague of mine as "How do you get people to act like they own the place?" At the core of this thinking is the fundamental belief that the power of the team will always improve the wisdom of the individual. The secret is the combination of *Sales Effectiveness* and *High Performance Teams* thus creating *High Performance Sales Teams*. There is no better example of this than the Test & Improve Process which has always been a key element of the Target Account Selling Methodology.

If you are going to ask salespeople to dedicate days out of the field to attend a workshop or even a webinar, you must deal with issues and content that they perceive will help them improve their sales results. That is why we always require a salesperson bring in a live opportunity to a TAS Workshop or a Test & Review Webinar. Conducting a sales training workshop and only discussing theory or methodology is the quickest way to lose a salesperson's attention. That is why we always ask them to bring live opportunities, something important for them to close in the near term that is challenging, no lay-ups. We then have them overlay the methodology with their live opportunity as they learn the TAS methodology. In other words, play with live ammunition. Now you have something for them to sink their teeth into. Once they understand the methodology and have applied it to their opportunity plans they are ready to test and review. Several plans are selected for presentation to the team and the team follows a formalized process to help the salesperson improve their plan so that they have an even better probability of success.

When this is first communicated to sales teams it is not typically met with much enthusiasm. To some it feels like an extra step that is really not required or even worse, busy work. To others, the Lone Rangers of



the group, it is downright frightening. After all a Lone Ranger maintains their status by hoarding information that if communicated might allow fellow sales team members to better compete with them... why would they want to do that! This is where organizational culture comes into play. Organizations that have the greatest success with TAS also create a culture that says it is a salesperson's responsibility to contribute success and knowledge to the rest of the team. In return they will benefit from the knowledge of the team. Of course not all opportunities can justify the resources of a full team review. But if the culture is in place there is a common language and the ability for this to be done even one-on-one. The results have been remarkable.

I once conducted a workshop for a senior group of account executives. Now believe it or not, not all salespeople follow instructions when asked to bring in a challenging opportunity or other course pre-work. This was the case with an salesperson I will call Waldo. Waldo was a Lone Ranger. He perceived himself to be very successful and was not at all interested in attending a workshop, much less sharing wisdom with his team members. The opportunity Waldo brought to the course was a lay-up... all of the bases covered and all boxes checked. Why? Because Waldo was the perfect salesperson... at least in his mind. Nothing he did could be challenged or improved. So, naturally I made sure Waldo presented his plan when it was time to test and review.

Waldo began his plan presentation with those fabled words "This is mine to lose.. I expect a signed contract any moment". He covered the plan and then the team began to ask questions about the plan. It soon became obvious to everyone that there was a gaping hole in Waldo's plan.. well, obvious to everyone except Waldo. Waldo had ignored an influential enemy in the political structure of his opportunity. He had no strategy to neutralize this enemy and to make matters worse it was clear that those that supported Waldo did not have much influence in the organization.

When we model test and review in it's most formal structure we then ask the presenter to leave the room so the team can create recommendations without the presenter getting defensive. We then bring the presenter back, Waldo in this case, and share our recommendations to improve the plan. Waldo left the room and as you might expect there were many recommendation but the primary one dealt with how to neutralize the enemy Waldo had ignored.

It was time for the team to share their recommendations with Waldo and we asked one of the group to go find him. After a long absence they returned to say they could not locate Waldo. "Where's Waldo" we asked? After much searching and phone calls to Waldo the team finally found him. Waldo explained that he would not return because while he was waiting he checked his messages. One of the messages was to advise him he had lost the opportunity he had just presented to the competition, you know the one that was his to lose? I later followed up to learn that the reason Waldo lost the deal was the enemy that Waldo had ignored.



I am sure the timing of an event like this and the obvious teaching moment will never happen again. Many times I work with sales teams to review plans and at first glance I really don't see how they can be improved. But they always can. I have never seen it miss and remain convinced that the power of the team will always improve the wisdom of the individual.

Test and review remains a key element of the Target Account Selling Methodology. It can be conducted live in a workshop environment or is included via webinar if TAS certification is done via the Dealmaker Virtual learning System.

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