Hans-Peter Neeb

# Account Management Strategies in B2B Sales

Generating Customer Value and Building Sustainable Business Relationships - Methodology, Processes, Tools

Springer

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# Foreword

When I was asked to write this foreword, I felt honored. Why? Because Hans-Peter Neeb has proven to be one of the most capable salespeople I have had the pleasure of working with in the more than two decades of collaborating with salespeople around the world. He demonstrates with this book his long-held conviction that the best way to achieve one's own success is to understand what the customers need and help them achieve it as well as possible—believing that profit is the applause for serving the customers well. I was fortunate to accompany Hans-Peter both personally and professionally on his journey through life.

It started over 20 years ago in a small office. On my first day as an expat in a foreign country, I woke up early, put on my best suit and set off for my big adventure—the turning point in my career. I could now call myself Global Account Manager—proud, excited, anxious—I didn't really know what that meant, and I didn't really understand what the job entailed, but "Global Account Manager" sounded good. So I made my way to a gold-clad building from the 1960s in a nondescript office park on the outskirts of Frankfurt. Here Hans-Peter and I began our careers as Key Account Managers (KAMs). Back then, I had no idea that this would develop into one of the longest and most rewarding personal and professional relationships of my career. We would learn a lot from our successes and failures—mostly from the latter. In the next ten years, we collected over a million frequent flyer miles from Frankfurt, visited dozens of cities around the world and built our customer base with the help of an exceptional team of professionals (e.g. from 70 million DM to almost 1 billion € total contract value in just seven years).

**What does it Take to be a Good KAM?**
I started my sales career before graduating from university, by scraping by with a number of retail jobs that eventually led to my first "real" job at ADP. Although I had taken courses on sales as part of my business degree,[1] I learned the basics at ADP that I still

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[1]Missouri State University was one of the first in the US to include the Sales/Sales Management program in the curriculum as early as 1984.

apply today. As I began to apply these skills in my KAM role, I realized something that plays an important role in the following pages and that Hans-Peter perfectly structures and relates to practice: The best salespeople are not always the best KAMs, but the best KAMs are good salespeople.

Hans-Peter embeds in this book the basic skills needed in sales into KAM structures. The basis of the program presented here are at the same time the fundamentals of sales: The customer determines the value proposition. With solid questions, you can convey more than with clever statements. And knowing your customers means little if you don't understand them. These truths underpin the best customer-oriented account planning activities.

**What does Customer Orientation Really Mean, and How can we Achieve it?**

My mother grew up in the southern part of the US, where good manners were of utmost importance. One of her favorite sayings was: "Good manners are nothing more than getting out of the way of yourself." That is customer orientation. Think first—and always—about what your customer wants and needs to be successful. Your customers don't care at all what you and your company can do, where you have invested, what your product can do, until you make these benefits relevant for the customer. That's what matters:

- The customer determines your value proposition.
- Goals are as important to the customer as challenges.
- Building a good value proposition is not complex, but difficult.

In this book, good customer-oriented attitudes are translated into repeatable behaviors. The focus is on both what the customer is trying to achieve and what he wants to avoid. As salespeople, we often spend a lot of time identifying our customers' pain points, because we believe that this is significant for them. But shouldn't we actually spend more time on what we and our customers want to achieve?

A good friend of mine, who was then COO of a large, global bank, explained it to me like this. He said: "At the beginning of the year, I get a small pot of money from the bank, with which I have to do two things: help the board achieve its goals and solve a number of problems. I invest this pot of money in the people who I think are best positioned and have the best ideas to help me solve the immediate problems as well as achieve the strategic goals. Getting support for both is important." Most top managers don't wake up in the morning and think about all their problems, but about how they can achieve their goals and implement a corresponding strategy.

Customer orientation is not complicated, but it requires time, hard work and patience. Sales teams need to ask more than tell, research before they act, and understand before they commit. Value propositions and good negotiation platforms are built from the outside in.

**How can the Right Culture for Your Culture be Leveraged?**

Anyone who has ever met a quota knows very well that "culture eats strategy for breakfast". Here, culture is considered from two perspectives: the geographical cultures in which the company operates, and the sales culture that one creates oneself. One has to understand the characteristics of the culture from which one's own KAMs come from and also those that prevail in the organization to which one wants to sell. The interplay of these two factors will determine whether the messaging, the stakeholder management, the negotiation strategy, the process and the tactic, etc. lead to the desired result. When one selects a KAM for a customer, one has basically married him or her to a culture that he or she then has to understand at least. Ideally, he or she has to develop a proper feeling for this individual culture.

In my lectures and trainings, I have developed different formats in the past depending on the time available to me and changed and modified the topics accordingly. A core topic that I always emphasize is that a good KAM spends 60% of the time selling his company to the customer, and 40% of the time selling the customer to his company. A KAM has to be able to build a bridge between both cultures; he has to often get his company to understand the customer, to meet him halfway and to deal with him on his terms.

Two decades in which I stood between German and American, Swiss and British or Singaporean and Austrian organizations have given me some great stories. One, however, has stuck in my memory, which for me is exemplary for the role of the KAM. We were working on getting our first big implementation order from the investment bank of Deutsche Bank, which was then mainly run by Americans. Before they committed, the business leaders wanted to interview the project manager selected to lead the project. As I prepared our German colleague for the conversation, I made it clear to him that he had to answer with definite words—mostly with "yes". Americans don't like problems, and they like a "can-do" attitude. Although the German colleague had led multi-billion-dollar projects in the entire Middle East for several years, he hesitated to say clearly that he could do the job well, even without knowing all the details.

On the day of the interview, the question came as expected: "Can you lead this project successfully?" He hesitated and turned to me, still not ready to commit to a speculative "yes" without further details—he was a German engineer. So I intervened and said: "Sure he can, tell them about your last project." Interestingly, he could present all the facts of the last project clearly and distinctly, recount all the successes based on facts and figures and ultimately help us win the project, but giving a speculative "yes" was not in his DNA. I had to do that for him. Understanding and bridging the culture between a German engineer and an American banker was a gripping experience that illustrates why the structures and methods presented in this book are so important.

The process described here not only helps to consistently master cultural challenges, but also combines the best of the Anglo-American sales culture with the structure and discipline of "Made in Germany". This methodology can be effectively implemented in different corporate and social cultures.

**Why is a Structured Approach Really so Important?**

When I worked for Siemens in New York in the late 90s, the then USA boss said in one of his monthly update messages: "The path to success is paved with processes." We were a group of American salespeople in our 20s who found this statement quite funny, especially given the hard German accent with which the message was delivered (we saved the video clip and watched it often). For us, selling is a talent, not a skill, and we didn't need any corporate processes to get in our way. But as I matured in the business world, I began to recognize the personal benefit of a process-driven, structured approach. Therefore, the following tips:

- One should start at the beginning. To do this, one should know where the beginning is. A defined process has a clear beginning.
- More is communicated with solid questions than with clever statements.
- Knowing the customer means little if one does not understand him.

I would summarize the benefit of this structured approach for salespeople as follows:

- Starting over with structure is easier than with a random approach and one gets up to speed faster—one knows what to look for before one starts. We have all inherited new customers or territories where we have little or no experience. This structure gives us the best chance to shorten the learning curve.
- The key to good sales is good questions. Unknowns (knowledge gaps) lead to questions. Knowing what one does not know is the first step to effective discovery.
- Discovery is a journey, not an activity; and journeys require a map. The discovery of the unknown leads to more and better activities than the known; it focuses the activities on the right priorities.
- It is not enough to know your customers, you have to understand them as well. To gain a deep understanding of the customers, you need a sufficient number of data points to draw conclusions and test ideas.

To look into the future, we can see that the world we will be selling into will continue to change faster and faster. Some things will remain, if not become more important, as new generations of customers join, for example:

- People want to be understood.
- A tailored message that speaks to the customer personally will always be better received than a general one.
- Companies are more complex than they appear.
- Customers want it to be easy to buy from us.

With this book, you will get the tools to achieve this today and tomorrow.

Finally, I would like to congratulate you on choosing what I believe to be a very useful tool in your future toolbox. I am confident that you will find that in this book, many decades of extensive knowledge and practical experience have been distilled into a useful guide for sales and KAM to understand how to make it easier for your customers to find their way to your door.

I wish you, dear reader, much success and fulfillment in your career as a customer expert.

Maryland, USA                                                                    Walter Westervelt
February 2022

# Acknowledgments

This book could only come about through important conversations with and inspirations from smart people in my network. I thank everyone for their time, interest and patience.

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I would especially like to thank our customers in the medium-sized and corporate sectors, who have always challenged me to think and search for solutions through scenarios and challenges. Without these practical experiences and projects from everyday life, this book would never have been created.

I would also like to thank the publisher Springer Gabler and my editor Manuela Eckstein very much for their trust and patience in accompanying me on this journey so cooperatively.

I am sure that I have forgotten important mentions. I hope they will forgive me.

I thank my wife Petra for her patience and understanding for my enthusiasm for the topic.

The book is dedicated to our two children Niklas and Lucy.

# Contents

# About the Author

**Hans-Peter Neeb** is an entrepreneur and strategist. He advises managing directors and executives in sales and key account management of corporations and medium-sized companies on the introduction of successful sales processes, structures and methods. He started his career in 2002 in key account management and B2B sales at Siemens AG in the corporate account management of the business unit information & communication. In his further professional life he held various roles and was managing director, in which he was responsible for national customers and international companies. His range of experience extends from owner-managed medium-sized companies in Germany to globally positioned corporations with complex, worldwide structures and different cultural circles.

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# Introduction

No question: There have always been and still are excellent salespeople with a successful approach in B2B sales. But in most companies, only a few methodical approaches are established. Somewhat casually said, in principle everyone does what he wants. My long-time colleague and friend Walter Westervelt and I had already years ago a concern to develop a practical methodology that provides the salesperson[1] with an immediate benefit for his work. It should be simple, understandable, directly applicable at the customer and deliver fast results. We collected practical examples, researched best practices and discussed the approaches with many entrepreneurs and executives. We systematized, simplified and expanded. In many projects and workshops we implemented our method, with which we always achieved good and sometimes excellent results.

A central idea of our method is to change the perspective. Many salespeople praise their offer by showing the diverse characteristics of their product or service. We, on the other hand, claim that one should not sell more. Because the successful mindset is to make it easier for the customer to buy. We want to ensure that the customer himself recognizes the added value that the offer and the performance promise provide for him. We will illuminate the important term added value later. To do this, we first have to understand the customer. And that requires a fundamental change of perspective.

An important tool to understand the customer is the *question*. It is often claimed that a salesperson must be able to talk well. In our experience, this thought unfortunately leads in the wrong direction. First of all, one has to understand in sales, in order to be able to

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[1] At this point, the following note should not be missing: For reasons of better readability, this book dispenses with the simultaneous use of the language forms male, female and diverse. All personal designations apply equally to all genders.

answer afterwards. Whoever wants to understand a customer must ask questions. Surely you know the saying: "Man was born with two ears and one mouth. He should use both in this ratio." This also includes a good preparation. Unfortunately, we have often experienced that salespeople came back from customer appointments without having asked the most important questions. That is why we have developed a process that enables a good preparation.

The school of thought is basically valid for anyone who works in sales. It is helpful for salespeople or key account managers who only look after one customer, but also for those who look after five or 100 customers, and can be applied to both existing and new customers.

- **The sales culture:** Germany in particular does not have a very pronounced sales culture. While in Germany the career path of a CEO tends to come from the areas of engineering or controlling, in the USA the CEO very often has a sales background. In America, you study sales, in Germany you end up in sales. One fact is that there are numerous marketing chairs in Germany, but hardly any chairs for sales and no systematic sales training. In America, there is the degree program "Sales Management", which you can complete as both a bachelor's and a master's degree.
- **The sales process**: An important success factor is a coordinated sales process. The individual steps must help the salesperson to structure and control his or her activities (*guided sales*). The idea is to systematically analyze and comprehensively understand the customer. The result at the end of a process step leads to the next step and you get a clear view of whether enough information about the customer is already available. This systematics alone is helpful, because in Germany there is a process for everything, but sales is done from the gut. Instead of doing sales erratically and according to your mood, it is more successful to follow proven steps one after the other.
- **Understanding the customer:** It is about understanding the customer, not just knowing him or her. This understanding is created by asking, analyzing and observing. We want to close knowledge gaps in a targeted way, and for that we have to recognize these gaps. The answer "I don't know" is a good indicator of a knowledge gap, because from this you can derive specific activities or develop questions to close these gaps. It is important to know what you don't know. Figure 1.1 gives an overview of the areas where insights are available or still need to be gained. The knowledge generated by asking and already available can be analyzed and converted into customer-relevant messages.

In the first part in Chap. 2 we will look at the method to enable the salesperson to work more successfully. Chapter 3 is also aimed at the sales managers who lead teams and are responsible for all customers. In Chap. 4 we will introduce different digital tools and services that facilitate the work of the salesperson. In Chap. 5 we will address organizational requirements in sales and give an overview of the context in which the described tools can be used.

| PRESENT | FUTURE | RESULTS |
|---|---|---|
| **Challenge** | **Growth** | **Questions** |
| We don't know, | We know, | Customer-oriented |
| What we do not know | What we do not know | Create questions |
| **Waste** | **Momentum** | **Messages** |
| Better to take waste | We know, | Customer-relevant |
| instead of waste. | What we know | Create messages |

**Fig. 1.1** "I don't know" is a good answer. © Hans-Peter Neeb 2022. All Rights Reserved

## 1.1 The AccountJourney®

The art of systematic and successful selling consists of understanding the customer in systematic steps (see Fig. 1.2), deriving concrete activities and communicating the added value of your own offer in the language of the customer. The success of the Account Journey or AccountJourney® (10S analysis) lies on the one hand in the fact that you understand what the actual added value for the customer is and that on the other hand you define activities that lead to better insights, that send the right messages to the customer or that you specify concrete communication measures for individual contacts. This
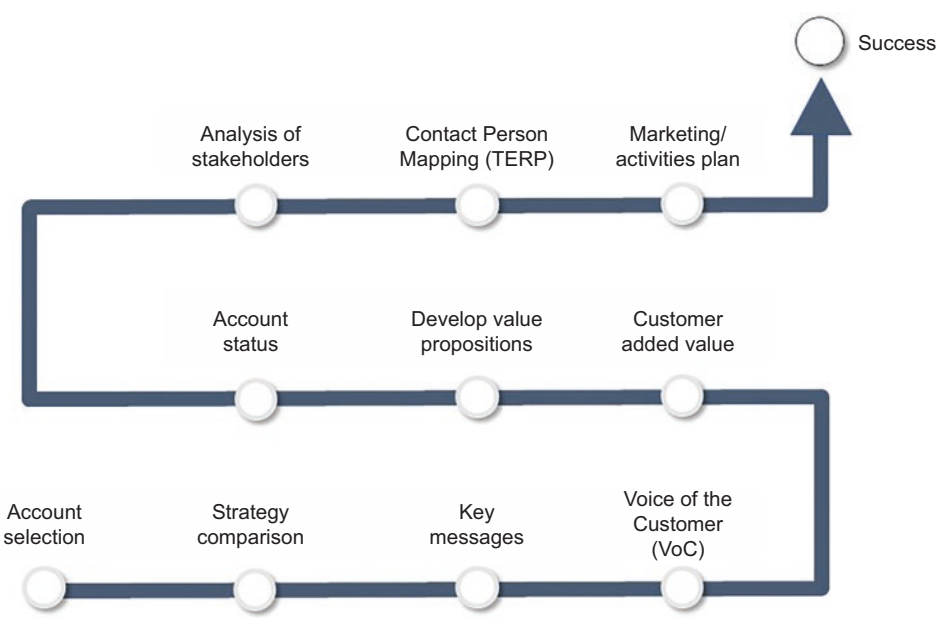


**Fig. 1.2** Understanding the customer in 10 steps. © Hans-Peter Neeb 2022. All Rights Reserved

simple, step-by-step systematics already contributes significantly to success, because it creates clarity and simplification. We will look at the individual steps in more detail in Chap. 2 "Sales Process".

**The AccountJourney®**

1. The **account selection** serves to understand the importance of each customer for my business.
2. The **strategy comparison** has the task of revealing how high the coverage ratio of one's own offer with the customer's strategy can be.
3. The **core messages** are derived from the intersection of the strategy comparison.
4. The principle of the **voice of the customer** helps to understand the customer and his character based on special insights.
5. The idea of **customer value** helps to recognize why the customer is a customer at all.
6. Developing the **value proposition** translates the customer value into a convincing communication, to demonstrate plausibly that one is the right provider.
7. The **account status** is a brief number-driven presentation of the business with the customer. With this we have thoroughly illuminated the level of the company.
8. The **stakeholder analysis** now looks at the stakeholders and decision-makers in the company. We need to understand their roles and tasks.
9. The **contact person mapping** ensures that every relevant person in the customer's company is addressed and a relationship is built with him.
10. The **marketing/activity plan** provides a framework of measures and contact points to engage with the customer in deeper exchange and strengthen the relationship in a result-oriented way.

The idea of this methodology is to better understand the customer by structuring one's own thoughts and analyses. The dialogues and activities should have concrete goals to gain the relevant insights and put them into the puzzle. In this way, one obtains a complete picture, in which the individual steps build on each other and generate more insights.

## 1.2    The Concept of Customer Value

The concept of customer value is central to this approach. We talk about the three levels of feature, benefit and added value or customer value. The same product can have different customer values for two different customers, because the actual value is determined

by the customer. Let's take as an example a provider of microphones. The special quality of the microphones is expressed in the features of pronounced frequency ranges, high sensitivity and special directional characteristics. The benefit from this is that these quality microphones can be used in the customer's own research & development, which require special precision. The actual added value from this is that the customer achieves a distinctive market positioning and a competitive advantage through his own R&D. Instead of talking about product features and characteristics, the focus of communication is the better competitive positioning of the customer. This is how the customer recognizes that the provider understands him, sees the actual added value and has the same mindset. Such a provider can help the customer move forward. Another customer may achieve a different added value from the same product. The value is determined from the customer's perspective, so the communication is not about selling features, but about understanding the customer value.

## 1.3   A Uniform Sales Process

With this approach, one also obtains a uniform management method in the sales team: Everyone knows how to proceed, everyone speaks the same language, uses the same documents in the same structure and the sales manager has a scheme according to which he leads the team uniformly. Especially in medium-sized businesses, we find that the owners are usually good salespeople and do a lot of things instinctively right, but they often lack the experience to transfer this sales competence to the employees and to ensure a uniform sales approach.

The good news is that sales and the sales process can be learned. Especially for young people, it is important to know that a sales process can be learned and that they can achieve success in sales from the beginning. It is not about innate characteristics, but about learnable skills. The purpose of the process is to understand the customer and his added value and to communicate this value in the customer's language.

In addition, despite all the learning opportunities, experience and talent, preparation is crucial. Only if a phone call or an appointment has been systematically prepared, can lasting success be achieved. It is important to consider in advance what result one wants to get out of the conversation and what questions should be answered. This avoids forgetting questions during the customer appointment and missing the corresponding answers. The sales process helps to keep track of which questions to ask, which messages to send and which activities to implement.

The central idea is: It is not about selling something to the customer, but about making it easier for the customer to buy. If the customer understands his added value, because it has been systematically analyzed and communicated in the customer's language, then he is ready to buy in order to receive the added value.

# Sales Process and AccountJourney®

<div align="right">**2**</div>

The sales process or the AccountJourney® pursues the goal of systematically examining each customer individually, understanding him and communicating his benefits in his language. The simplicity and clarity lies in the sequence of the ten individual steps (Fig. 1.2). This process should be run through at least once a year per customer. We will get to know some tools or instruments that help with the implementation of the steps and with the evaluation of the results. The insights gained should be written down for the significant customers as part of an account plan (Sect. 3.2).

## 2.1 Account Selection

Step 1 is the account selection (Sect. 2.1). An important question is first of all: On which customers should the sales resources be concentrated? Where is the best potential available? Where is the maximum benefit to be expected? Which customers should be examined and cared for more closely in the further course? Where is it really worth it? Through the account selection and the selection matrix used, the relevant customers are filtered out. The remaining customers can and should be cared for differently, which in the daily business can mean less or even no care at all.

At least once a year, the sales team should do an analysis of the customer base and filter out which are the significant customers. I deliberately do not say the "largest" customers, because size (e.g. sales) is not always the decisive criterion. We want to make the right revenue (Fig. 2.1).

This includes the following considerations:

- Who buys particularly profitable offers?
- Who buys the innovative offers?
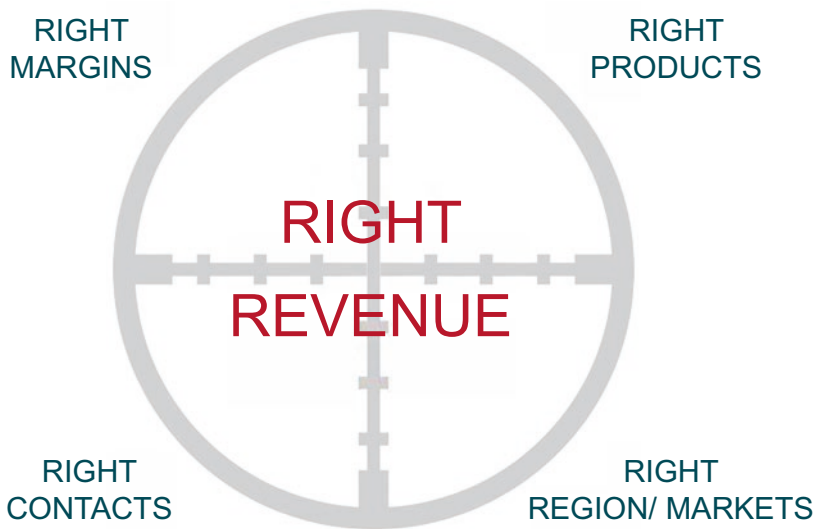
**Fig. 2.1**   The right revenue. © Hans-Peter Neeb 2022. All Rights Reserved

- Who develops new offers with us?
- Which customers are active in novel segments?
- Who is a special reference customer in an area?
- Who has what potential?
- Etc.

A methodical scoring according to these or similar criteria leads to a top-down ranking of the individual customers and helps to focus on the significant customers. These have to be cared for more intensively in sales than the remaining customers. As a consequence, this can lead to an increase or decrease in the care of a customer compared to the previous year.

Various evaluation factors are included, such as customer background, strategic focus, customer potential, customer relationship or customer culture. Table 2.1 provides a simplified view of this. Behind the main factors are further individual factors, which are evaluated individually or not, depending on whether it makes sense for the customer or the industry. This analysis is carried out at least once a year. For significant customers (see below), a quarterly analysis may be appropriate.

a. **Customer background**
   The assessment is based on various influencing factors, such as geographical overlap, financial strength and market leadership. The geographical overlap of customers and providers plays a prominent role. Are we present in every country of the customer and in the country where the headquarters are located? Can we thus access the potential?

**Table 2.1** Account selection matrix

| Map of strategic customers | Customer background | | Strategic focus | | Customer potential | | Customer relationship | | Customer culture | | ... | Total |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Customers | Points | Score | Points | Score | Points | Score | Points | Score | Points | Score | ... | |
| Customer Metal | 6 | 60 | 8 | 160 | 7 | 70 | 7 | 210 | 7 | 35 | ... | 7.1 |
| Customer Pharma | 5 | 100 | 5 | 100 | 6 | 60 | 6 | 180 | 4 | 20 | ... | 6.1 |
| Customer Service | 10 | 50 | 6 | 120 | 4 | 40 | 5 | 150 | 8 | 40 | ... | 5.3 |
| ... | ... | ... | ... | ... | ... | ... | ... | ... | ... | ... | ... | ... |
| Importance | ... | 10 | ... | 20 | ... | 10 | ... | 30 | ... | 5 | ... | 75 |

What is the financial strength of the customer? Is he able and willing to place his budgets with us? Is he the market leader in his segment? Does he serve us as a well-known and respected reference customer everywhere?

b. **Strategic focus**

This includes on the one hand the extent of coverage of customer demand by our core business and on the other hand what we want to achieve with our strategy for this customer. Does the business we do with the customer belong to our core business or is it peripheral activities? Does the customer have a substantive relevance for us? Does our strategy for this customer lead us to the right projects in terms of size, type and frequency in the future? With these considerations, the focus is not on the current situation, but on the medium and long-term outlook.

c. **Customer potential**

In this analysis, one can look at the size of the addressable business, the revenue, the margin and the cross-selling potential. The criterion of addressable business is the maximum volume that could be achieved with this customer. Revenue is considered absolutely. Margin can be considered absolutely or relatively, because there can be customers with large revenues who make relatively little margin in percentage terms, which then usually does not provide the decisive lever for the overall margin. The assessment of the cross-selling potential is an estimate of how many other approaches can be placed with the customer. Here, the core business should be considered primarily.

d. **Customer relationship**

This analysis puts the relationship strength as well as the competitive intensity to the test. The strength of the relationship plays a role in how many contacts we have to key people, how easy it is for us to increase this number and how easy it is to get customer appointments. The intensity of the competition includes the number and strength of the competitors, the duration of their respective history, the quality of their relationship with the customer, their possible status as preferred partner and the breadth of their relationship with the customer.

e. **Customer culture**

To evaluate the culture of the customer, we look at both the ease of being successful in sales and the ease of delivering the offered service. In the sales perspective, we include the degree to which the values and behaviors of our own and the customer's company match well, the strength of the customer's business units versus purchasing on the customer side and how professional and efficient the purchasing process is. In the performance perspective, we consider how smoothly the service is delivered with what effort compared to the revenue and margin.

We have mentioned essential, practical examples in the upper area, which can be extended for the respective case or specific industries. Possibly, one or the other aspect plays no role in the specific case and can be left aside. In addition, the individual factors are weighted with their individual importance across all customers. This is an assessment

| | |
|---|---|
| **Upper part** | Key customers that require intensive support. Sales resources should be focused here. |
| **Middle part** | Good customers that require good sales support. |
| **Lower part** | The intensity of sales support may need to be reassessed. Alternative/hybrid forms of distribution and more digitalisation may be necessary. |

**Fig. 2.2** Distribution of the customer list according to sales intensity. © Hans-Peter Neeb 2022. All Rights Reserved

of the sales team or the sales manager. Also, the evaluation of the individual customers can be done within the sales team. This can also trigger an additional learning process, by developing further insights through comparison and weighing across the different customers.

The sorted result of the customer list can pragmatically be divided into about three parts as shown in Fig. 2.2. A division into three groups is suggested, but not mandatory. In the upper part are the essential customers who need intensive care. Resources must be focused quantitatively and/or qualitatively there. So-called major customers (key accounts) should be found here. If this is not the case, this results in a new, interesting finding that can lead to changes. In the middle part are customers where the intensity of sales support should be adequately adjusted. An important question is what sales focus is justified here. In the lower part of the customer list, a more reactive approach is required. The support should not exceed a certain reasonable level. Possibly, alternative/hybrid forms of sales are necessary here and a stronger intensification of digitalization in sales would be indicated. Some of these customers are more on a watch list. The customers are analyzed only once a year, instead of quarterly as with the significant customers.

Also interesting are temporal changes in this list from year to year. There may be climbers and fallers. The reasons for such movements should be examined carefully, and if necessary, sales adjustments should take place. Also important is the recognition of the trend lines. If customers rise or fall for several years in a row, this may indicate a consolidating, long-term development that gives the respective customer a new strategic importance.

Another important aspect is the revenue size of the customer. It may well happen that large customers appear lower down on the list because there is only a low future potential, the cultures do not really fit, the core business is rather underrepresented, etc. This may surprise at first, but such customers are possibly not very promising according to the analysis. Large customers do not always yield the best profit. They can be costly and complicated, so that the costs of service delivery are above average. Causes can be, for

example, complex processes, complaints or a constant need for adjustments. These customers should be retained and "milked" in the short/medium term, because they fit (no longer) to the actual core of one's own business. The reason may also be a further development on the customer and/or provider side, which has led them apart. This shows that the account matrix also provides a simple, elementary tool for customer management.

▶   Note
    In the account selection, the customer potentials are evaluated in order to focus the sales resources on the most promising customers.

By using a simple method and suitable score characteristics, the customers are identified to whom the essential sales resources should be directed.

## 2.2   Strategy Comparison

The strategy comparison is the second elementary step in the process. Through this evaluation, we understand what the customer wants to achieve and how we can contribute to it. This makes our relevance for the customer clear.

The strategy comparison or StrategyOverlap® is performed for each significant customer. The special feature of the StrategyOverlap® method is that this comparison, as shown in Fig. 2.3, is carried out on two, three or more levels and contrasts the customer

| Company level | CUSTOMER information | PROVIDER information | Company level |
|---|---|---|---|
| Strategy | | | Strategy |
| Targets | | | Targets |
| Challenges | | | Challenges |
| **Business unit / project level** | Why? | | **Business unit / project level** |
| Strategy | | | Strategy |
| Targets | | | Targets |
| Challenges | That means? | | Challenges |
| **Personal level** | | | **Personal level** |
| Strategy | | | Strategy |
| Targets | | | Targets |
| Challenges | | | Challenge |
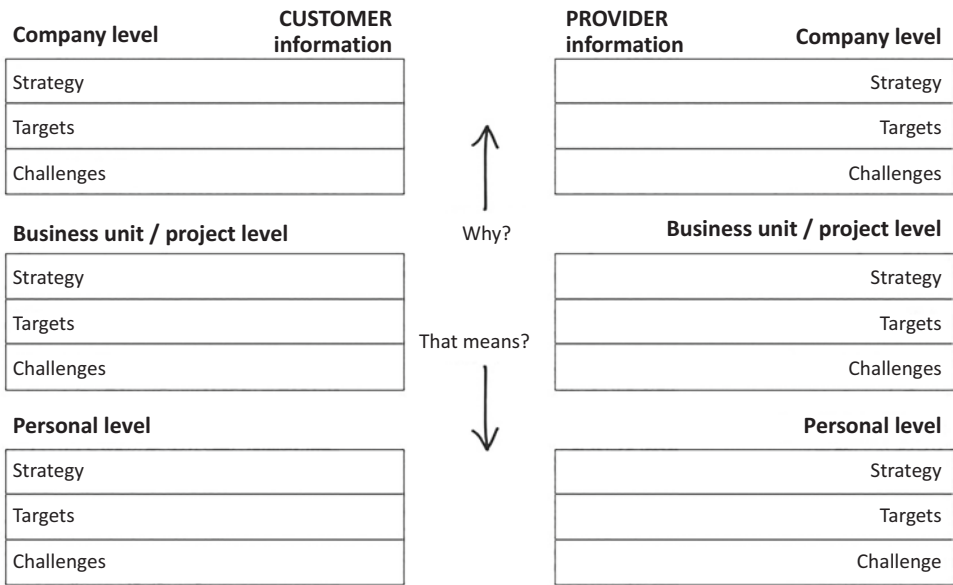
**Fig. 2.3**  Strategy comparison. © Hans-Peter Neeb 2022. All Rights Reserved

side with the provider side. Only the overlap (*sweet spot*) of both sides is really relevant for the customer. The strategy, targets and challenges are considered. On the highest level, the company level, the information about strategy, targets and challenges is analyzed. If there are individual significant business units or key projects, the analysis is performed on the second level. On the lower level, the interests of the key contacts are analyzed and personal motivations are taken into account. While one person wants to advance their career, another wants to implement a flagship project, and a third wants to be home with their family in time in the evening. It is important to consider how the offer or project also supports these personal interests or at least does not contradict them. It may happen that personal goals of employees of the customer company partly contradict the overarching goals of the customer company, but are not recognizable for the management on the customer side. This is not necessarily beneficial for the customer's company, but it happens and is quite human. A good salesperson must recognize this discrepancy and be able to deal with it. He must help the customer achieve his goal and at the same time not lose sight of the goal of his contact person. In some cases, there may even be constellations with irreconcilable contradictions. Then the *Buying Center*, as described in Sect. 2.7, and the main decision-makers play an important role. Here, professional leadership and clear communication by the salesperson are required.

At the company or business unit level, it is about how the offer contributes to the respective strategy or goals of the customer company. The customer is only interested in offers that support his own measures as well as possible. This is exactly what this analysis serves, and after working it out together, this contribution to the customer's strategy must be at the center of the messages to the customer and determine the further thinking. At the company level, the following simple example can be given to illustrate: If the provider has a global network, but the customer is only focused on one country, this aspect does not matter and is not in the *sweet spot*. This point has almost no relevance.

There may be more levels, depending on the complexity and depth of hierarchy in the customer's organization, which is often the case with global structures or corporations. Looking one level up, one can ask the question "Why?". Looking at the level below, the question "That means?" helps. This way, the levels are logically interlocked in terms of content. The levels depend on each other. The analysis of the StrategyOverlap® should be done from top to bottom, which is why this approach in the strategy comparison is also called waterfall analysis.

The customer's strategy determines what goals he pursues with his investments. We want the customer's investments or our possible share of them, and that is why it is so important to understand his strategy. Investments follow the strategy. Salespeople often ask about the *pain* (pain) of the customer, in order to get the corresponding budget. This can be too small-minded and fall short. We want to think one level higher and look at the strategy, in order to get his investment.

**Customer: Liquefied gas manufacturer**

The provider is an international personnel service provider that offers temporary workers for specific projects in its core portfolio. The customer is an international liquefied gas manufacturer. We first look at the company level, then the project level, and finally the individual level (Fig. 2.4).

Let us start with a somewhat more detailed analysis at the customer's company level. The customer has set itself the goal of increasing the proportion of women in senior management to 13% by 2021. The provider, the personnel service provider, was itself named one of the top 50 employers for women and thus has experience and reputation in this area. The personnel service provider has installed a promotion program for women, which gives him the opportunity to bring his own expertise into play. In addition, the liquefied gas manufacturer intends to significantly expand the number of temporary project staff from 6 to 8%. This area forms the core business of the provider, with which he generates a high margin and would experience a large increase from this customer. This creates a unique opportunity to invest in a pool of skilled workers with selected qualifications and make them available to the customer under a framework contract. Furthermore, the customer has formulated in its strategy that it wants to become the global market leader for liquefied gases and grow strongly in the USA in particular. The provider's strategy is focused on multinational customers and has a large presence in the USA, so that he can ideally support the customer's

## Identify and walk a common path to success
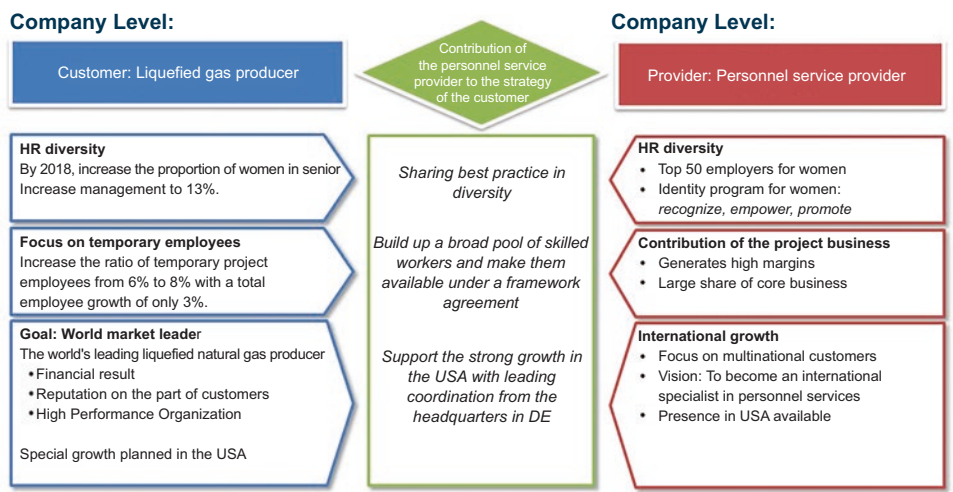


**Fig. 2.4** Overview of the strategy comparison (personnel service provider). By © Hans-Peter Neeb 2022. All Rights Reserved

| Company level | CUSTOMER Information | Strategy comparison | PROVIDER Information | Company level |
|---|---|---|---|---|
| • Increase the proportion of women in senior management.<br>• Increase the number of temporary project staff.<br>• International growth, especially in the USA. | | | • Top 50 employers for women.<br>• Large share of core business.<br>• Focus on multinational customers.<br>• Presence in USA available. | |

**Business unit / project level** · · · · · · · · · · · · · · · · · · **Business unit / project level**

| • STEM qualifications are needed. | | • Identify, acquire and retain qualified STEM resources in the market for the long term. |
|---|---|---|

**Person level** · · · · · · · · · · · · · · · · · · · · · · · · · · · **Person level**

| • Set up division, take over management and move to US. | | • Personally manage the project to success leading clients internationally and grow into the role of GAM. |
|---|---|---|

**Fig. 2.5** Overview of the findings and the sweet spot at the company level. © Hans-Peter Neeb 2022. All Rights Reserved

strategy. The overlap in the sweet spot is obvious and the value of the provider for the customer is clear to see.

At the project level (Fig. 2.5), the content focus is on the STEM qualifications. For the provider, this is a strategic field that he wants to strengthen sustainably. The customer is looking for exactly these sought-after qualifications. Through the framework contract of the customer, the personnel service provider can invest in this area and bind people to himself without having to take too much risk. Thus, he can address and acquire the right qualifications in the market in the long term. The STEM qualifications represent the sweet spot.

At the individual level, the constellation showed that the acting person on the side of the liquefied gas manufacturer wants to build up this international pool, wants to be responsible for it as a leader, and also intends to go to the USA. On the provider's side, the ambition of the account manager is to serve this customer internationally and thus grow into the role of a global account manager (GAM) with a promotion. Thus, there is also a fit recognized and given here. ◄

**CASE STUDY Financial Services Provider**

### Customer: Investment Bank

A provider of financial services with headquarters in the USA wants to strategically expand into Europe with further outsourcing business (Fig. 2.6). An investment bank based in the USA, in turn, has acquired a company in Europe to strengthen its presence there. The financial service provider now intends to win the outsourcing business from the investment bank. This would create a symbiosis that helps both

| Company level | CUSTOMER Information | Strategy comparison | PROVIDER Information | Company level |
|---|---|---|---|---|
| • Investment bank buys firm in Europe to strategically cover market. | | | • Financial services provider wants to grow in Europe through outsourcing. | |

| Business unit / project level | | | | Business unit / project level |
|---|---|---|---|---|
| • Consolidate five historically grown platforms | | | • Building an international platform | |

| Person level | | | | Person level |
|---|---|---|---|---|
| • Retire with peace of mind only when a solution for the platform community has been found. | | | • Personally committed to ensuring that the outsourcing consolidation will be successful. | |

**Fig. 2.6** Overview of the strategy comparison (financial service provider). © Hans-Peter Neeb 2022. All Rights Reserved

partners to successfully implement their respective strategy. Thus, the sweet spot for the customer is easily recognizable at the company level.

At the project level, it turns out that the investment bank intends to consolidate its five historically grown transaction platforms. The financial service provider wants to build an international platform. The customer can easily be convinced that this strategy ideally supports his strategy and that there is a good sweet spot.

At the personal level, there is an interesting constellation. On the side of the investment bank, the person responsible for the platforms, which he built, has been retired for several years and successfully asked back to the active job due to serious problems. It is a matter of his heart to now consolidate the platforms and achieve a successful solution. He feels responsible for this and does not want to retire again before. This customer can now be given the good feeling of being able to offer a successful solution, so that he can enjoy his retirement peacefully. ◄

An important question is how to get to the insights. Various sources play a role here. First, the contacts at the customer are a first source of information. You just have to ask. Often it is very simple, but no less important. The customer realizes that the salesperson is interested in the customer's strategy and that his offer can help to successfully implement this strategy. In such a case, the time in a conversation is well invested, because the salesperson is perceived as a partner at eye level. It is always amazing what you can find out if you ask honestly and interestedly. For this, both appointments, phone calls and e-mails are perfectly suitable. The crucial point here is to prepare thoroughly and make sure that you come back with the right answers. The above schemes help with the structuring.

But not always questions are enough or lead to the goal. There are even customers who do not know their own strategy or cannot reproduce it correctly. Then other or complementary sources are necessary. The customer's website and the investor relations area play an important role here. Because you also have to explain your strategy to the investors or shareholders. Sometimes very interesting aspects come to light. For listed companies, the annual report and the balance sheet press conference are also helpful. Furthermore, press articles or interviews at board or management level play a role. It may also be that important information about the strategy is communicated in presentations or conference contributions. In addition, it may be interesting to take a closer look at articles by journalists or stock market ratings. Possibly, there are also external third parties, such as industry experts, university professors or consultants, who can give an assessment. From these different sources, a comprehensive overall picture can be created.

To obtain information about the strategy and the goals, one often needs suitable, stimulating questions to get the customer to talk. A helpful battery of questions could look like this:

- What is your strategy?
- What are your goals? What goals are you measured by?
- Where do you want to be in the next two to three years?
- What do you want to achieve?
- Where are you heading?
- What are your strategic steps?
- What is your agenda?
- What does your business planning look like?
- What is the goal of your area?
- What developments do you have in mind?
- How do you want to be successful in the medium/long term?
- What does your boss expect from you?
- What does the management expect from you?
- Etc.

Of course, one should not ask all the questions in this order. It is rather a suggestion list to get alternative approaches. Sometimes one has to ask the questions in the same or modified way up to three times to get a helpful answer. This varies from contact person to contact person. In such cases, alternative formulations help.

Knowing well that strategy and goals are not the same, it has proven useful in practice not to emphasize this academic distinction too much. A strategy is the bundle of measures to achieve the goals. In practice, it is much more important that the customer starts talking. If necessary, one can ask specifically in the course of the conversation.

When it comes to personal goals, the question approach is different:

- What is personally important to you?
- What do you value as a person?
- What do you want to achieve personally?
- What motivates you?
- What do you work for?
- Why do you get up in the morning?
- What is your agenda?
- What is your roadmap?
- What is close to your heart?
- What would have to happen for you to no longer be motivated to do your work?
- Etc.

As a rule, one will not get answers to all these questions in a first meeting. For this, a more developed, trustful relationship is required. Often, one only gets reliable answers to these individual and very personal questions in a one-on-one conversation. It also makes sense to discuss these questions only in a personal conversation and not on the phone. A joint dinner is even more suitable.

▶   Note
     With the strategy comparison, one gets a clear, systematic view of the customer's
     goals and the part of one's own offer that is relevant for the customer.

The simplicity of the structure of the StrategyOverlap® helps to clearly recognize which part of one's own offer is relevant for the customer and which is not. On this basis, the core messages are derived.

## 2.3    Core Messages

The customer will only really listen if we have something relevant to say. That is why the quality of our core messages is so important. If you derive your core messages from the sweet spot, the customer will listen to you because you are both part of his strategy and outline our positive contribution to it.

The overlaps from the strategy comparison lead to the core messages that are relevant for the customer. They are intended to help the customer understand us. This requires that we first understand the customer, as illustrated in the strategy comparison.

The building blocks of the core messages span the different levels (Fig. 2.7) and address the respective contacts of a level. The messages must be formulated in the language of the customer. They should convey to the customer how the offer supports his strategy and the achievement of his goals (in-)directly. These messages must be known

| Company level | CUSTOMER Information | **The building blocks of the core messages** | PROVIDER Information | Company level |
|---|---|---|---|---|
| Strategy | | | | Strategy |
| Targets | | | | Targets |
| Challenges | | | | Challenges |
| **Business unit / project level** | | | | **Business unit / project level** |
| Strategy | | | | Strategy |
| Targets | | | | Targets |
| Challenges | | | | Challenges |
| **Personal level** | | | | **Personal level** |
| Strategy | | | | Strategy |
| Targets | | | | Targets |
| Challenges | | | | Challenges |

**Fig. 2.7** The building blocks of the core messages. © Hans-Peter Neeb 2022. All Rights Reserved

by everyone who has contact with the customer. This includes, for example, colleagues from other areas, such as service, maintenance, project management, etc. This aspect is discussed in more detail in Sect. 3.3.

Of central importance here is how well I understand my customer. One often hears: "I know my customer." That is good, but not enough. "But do you really understand your customer?" That is the really crucial question, to which you must have answers ready. The sweet spot idea is an important key and door opener here. What drives the customer? What strategy does he have? What goals does he want or have to pursue? Why does he think and act the way he does? What constraints is he in? How does his current market move? What does his future market look like? How can we really help him? What will our share of his success be? How do we communicate so that he understands us?

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**CASE STUDY Personnel Service Provider**

**Customer: Liquefied gas manufacturer**

In the already described example of the personnel service provider (Fig. 2.8), it is important to always point out that one is the right strategic partner, because first, one brings the desired expertise on the topic of diversity, second, one is focused on his business of temporary project staff on multinational companies, and third, one has the desired strong presence in the USA. The messages are correct because they are relevant for the customer and contribute to his strategy.

On the project level, it is important to assure the customer that one will invest in the STEM resources in the long term, in order to provide the desired qualified pool. On the personal level, it is important for the decision maker to know that he can realize his personal dream of moving to the USA with the commitment of the contact person on the provider side. ◄

| Company level | CUSTOMER Information | The building blocks of the core messages | PROVIDER Information | Company level |
|---|---|---|---|---|
| • Increase the proportion of women in senior management<br>• Increase the number of temporary project staff<br>• International growth, especially in the USA | | *Our own experience with diversity as well as our global presence and strength in the US support the strategy.* | • Top 50 employers for women.<br>• Large share of core business.<br>• Focus on multinational client.<br>• Presence in USA available | |

**Business unit/ project level**                                           **Business unit / project level**

| • STEM qualifications are needed | *We are investing in a skilled STEM pool that we are constantly growing.* | • Identifying, acquiring and retaining qualified STEM resources in the market for the long term |
|---|---|---|

**Person level**                                                           **Person level**

| • Build up a division, take over the management and move to the USA. | *My personal commitment and dedication is the guarantee that you will succeed as a leader.* | • Personally manage the project to success leading clients internationally and grow into the role of GAM. |
|---|---|---|

**Fig. 2.8** Overview of the core messages (personnel service provider) in the sweet spot. © Hans-Peter Neeb 2022. All Rights Reserved

**CASE STUDY Financial Services Provider**

**Customer: Investment Bank**

For the investment bank (Fig. 2.9), the message and commitment that the financial service provider wants to fundamentally expand its outsourcing business in Europe is important. This supports him in expanding his own European business, which he started with the investment in a local company.

The bank wants to consolidate its transaction platforms into one platform and expects the message or commitment that the outsourcing provider is sustainably ready for the investment and can deliver the service successfully in the long term.

The decision-maker on the customer side wants the assurance and ability from the provider to take over his life's work successfully and to know it in safe hands. Only then can he retire peacefully. That is relevant for him.

These messages are essential. Other topics would only distract or confuse the customer, because they do not support his actual strategy. That is why it is so important to get to know the real goals of the customer exactly and to focus only on them. ◄

**CASE STUDY Manufacturer of Refrigeration/Freezing Systems**

**Customer: Food Retailer**

A food retailer (Fig. 2.10) wants to halve its greenhouse gas emissions as part of its growth goals and thus pursue a course of sustainability. A provider of refrigeration and freezing systems relies on innovations to enable more energy efficiency and

| Company level<br>CUSTOMER Information | The building blocks of the core messages | PROVIDER Information<br>Company level |
|---|---|---|
| • Investment bank buys firm in Europe to strategically cover market | *Through our outsourcing business in Europe we secure and support your acquisition in Europe.* | • Financial services provider wants to grow in Europe through outsourcing |

| Business unit / project level | | Business unit / project level |
|---|---|---|
| • Consolidate five historically grown platforms | *We help you consolidate your platforms by investing in an international platform.* | • Building an international platform |

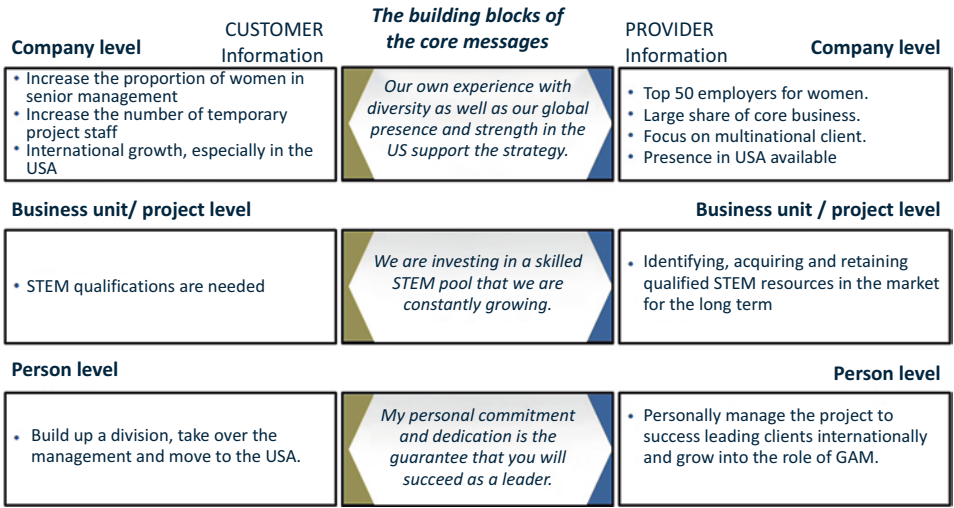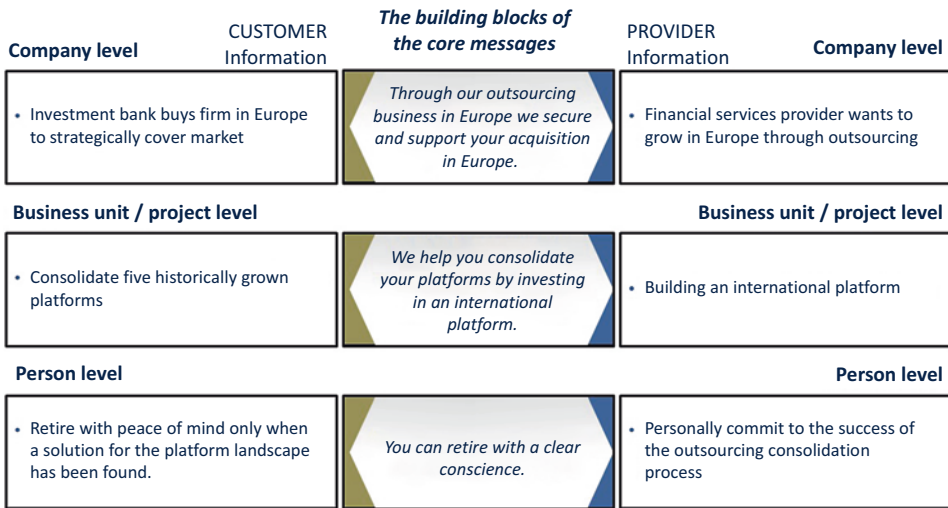| Person level | | Person level |
|---|---|---|
| • Retire with peace of mind only when a solution for the platform landscape has been found. | *You can retire with a clear conscience.* | • Personally commit to the success of the outsourcing consolidation process |

**Fig. 2.9** Overview of the core messages (financial service provider) in the sweet spot. © Hans-Peter Neeb 2022. All Rights Reserved

| Company level<br>CUSTOMER Information | Strategy comparison | PROVIDER Information<br>Company level |
|---|---|---|
| • Sustainability: Grocer aims to achieve sustainable growth and halve greenhouse emissions from 2016 to 2020 | *The manufacturer enables food retailers to achieve their environmental goals by converting the systems in all stores worldwide* | • Innovation: manufacturer of refrigeration/freezing systems wants to provide sustainable innovations to enable environmental protection and energy efficiency |

| Business unit / project level | | Business unit / project level |
|---|---|---|
| • Expansion: Investment of millions in own discount brand in Romania | *Local support for food retailers through the direct network in the local countries.* | • Service Network: Expand presence in Eastern Europe by 2020 and further develop customer service internationally |

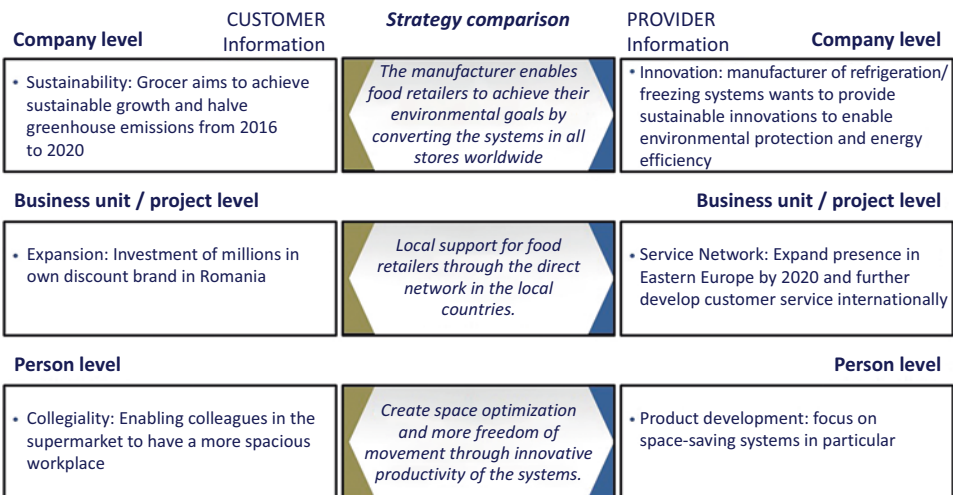| Person level | | Person level |
|---|---|---|
| • Collegiality: Enabling colleagues in the supermarket to have a more spacious workplace | *Create space optimization and more freedom of movement through innovative productivity of the systems.* | • Product development: focus on space-saving systems in particular |

**Fig. 2.10** Overview of the core messages (manufacturer of refrigeration/freezing systems) in the sweet spot. © Hans-Peter Neeb 2022. All Rights Reserved

thus environmental protection. For the food retailer, the cooling systems and lighting account for 75% of the total energy consumption, which represents a significant lever. The manufacturer can help the food retailer achieve its environmental goals.

In addition, the retailer is aiming for an expansion that is particularly focused on Romania. There, the cooling system manufacturer has a good presence and can bring

its service network in Eastern Europe into play. In this way, the manufacturer can directly support the expansion of the retailer.

Finally, the contact person on the customer side wants to provide the colleagues on site with an improved workplace. Especially space-saving cooling systems are helpful to achieve the personal goal of the contact person. ◄

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**CASE STUDY Aviation & Facility Service Provider**

### Customer: Low-cost Airline

A low-cost airline (Fig. 2.11) wants to set a sign in the areas of sustainability and diversity in addition to high customer satisfaction. The provider of aviation and facility services lives diversity itself in the company and achieves sustainability and innovations through targeted innovation. Thus, he can help the customer achieve his corporate strategy.

The airline wants to expand its offer while further reducing costs. The international expansion of the service provider as well as its just-in-time solutions in combination with effective teamwork help the airline to pursue these goals successfully.

The person on the customer side lives a pronounced service attitude and values it in providers. Service excellence is anchored in practice in the DNA of the service provider. This reinforces the service attitude of the airline. ◄

Sales means communication. This includes asking questions and sending messages. Although questions are most important, after the sweet spot analysis it is important to consistently place the right statements. Once you have worked out the core messages that

|  | CUSTOMER Information | *Strategy comparison* | PROVIDER Information |  |
|---|---|---|---|---|
| **Company level** |  |  |  | **Company level** |
|  | • The low-cost airline wants to achieve sustainability and diversity<br>• Customer satisfaction through product and process innovations | *Sustainability, diversity and innovation support through own experience and specific skills.* | • The Aviation & Facility service provider lives diversity and enables sustainability through innovation<br>• Innovations through creativity and experience |  |
| **Business unit / project level** |  |  |  | **Business unit / project level** |
|  | • Expansion of product range and economies of scale through international growth<br>• Reduction of costs through increased efficiency | *Enabling growth and efficiency through our own network and best-in-class working practices.* | • International expansion in Europe and worldwide<br>• Just-in-time solutions and teamwork enable quality under time pressure |  |
| **Person level** |  |  |  | **Person level** |
|  | • Service attitude: customer satisfaction and loyalty as a maxim | *Enable the customer's service performance through their own outstanding service performance.* | • Contributing to customer satisfaction with service excellence |  |

**Fig. 2.11** Overview of the core messages (aviation and facility service provider) in the sweet spot. Hans-Peter Neeb 2022. All Rights Reserved

are relevant to the customer, you have to use them consistently. Consistent and consequent means, for example, uniform across teams. Consequent means that you stick to the statements, instead of changing them constantly. You have to focus on the messages that are relevant to the customer and that help him. This applies to appointments, phone calls and emails alike. Only then do other contents play a role. However, the prerequisite is that they reinforce or complement the core messages that form the basis. The control question is always: Which statements should the contact person on the customer side remember and which should he be able to communicate to his boss? The latter is the real art. For this, the messages have to be formulated so relevant and concise that they can be easily passed on. In practice, this is not always easy, but the simple grids described provide support here.

▶   Note
    Identify the services that are relevant to the customer and develop relevant messages that the customer understands and that help him.

The customer receives the messages that fit his individual context and that help him with his strategy.

## 2.4    Voice of the Customer (VoC)

To better understand the customer, it is important to know the context in which the customer operates. To immerse yourself in his world, you have to understand his perceptions, his experiences, his communication, his actions and decisions. The voice of the customer is also often called voice of the client (voc). There is also a second important thought: If you understand the customer, you help him to understand you as well.

Our communication has to be in the language of the customer. For this, we have to understand both the content and the language world of the customer.

The concept of "voice of the customer" or "voice of the client" is a proven concept to understand the customer, his drivers, his context and the interrelationships. This also helps to better recognize the possible interdependent dependencies. Helpful, for example, is the view of the added value that was generated in the past at the customer, an overview of challenges, negative experiences, highlights, important information, as well as an analysis of the won and lost deals. This information should be systematically recorded and shared in a simple way. (Fig. 2.12)

### 2.4.1   Generating Value for the Customer

Which initiatives have generated which added value for the customer (Sect. 1.2)? For existing customers, this analysis can be based on own projects or initiatives. For new

| Value generated at the customer | Challenges/negative experiences |
|---|---|
| | |

| Highlights and important information | Important business won/lost |
|---|---|
| | |

**Fig. 2.12**  Voice of the customer. © Hans-Peter Neeb 2022. All Rights Reserved

customers, however, it is also necessary to ask about experiences with previous or other providers. Find out what generated the actual added value. The added value is so significant that we will go into it in detail in the next chapter. In short, the value for the customer is

- a achieved state with a significant improvement,
- that has expanded or optimized the business model,
- that has significantly increased the competitiveness,
- that has greatly improved the efficiency,
- that has noticeably further developed the organization

etc.

In sum, the added value has had a very positive effect on the own business or company. Different value drivers can play a role here. It can be about delivery times and effectiveness. Innovation can be a key aspect. Others value collaboration and stronger integration of value chains. Possibly, the quality and maturity of the project implementation also plays a role. Ultimately, it may also be decisive that the customer simply saves money or can generate new revenues. These are now rather general examples, which have to be specified in terms of value for the respective customer situation. But these examples give a first impression of which topics can be relevant.

## 2.4.2    Highlights and Important Information

What significant experiences has the customer had, what events would be meaningful for him? How did it come about? What decisions led to it? Who actively contributed to it? How do you talk about it? What language and words are used? Are there specific jargon and terms with a certain meaning that you need to know? How do the customer's contacts talk about it? What are consistent patterns and phrases that recur and are understood by everyone? Every company and industry has its own language world. All this belongs to the customer's context.

What relationships exist between which people? How did it come about? What experiences have they shared? What old contacts are there? Do you know each other from a previous, different context? What old stories are told? Why are they so formative? How do they influence today's thinking and acting? In which perspectives do you (not) agree?

Immerse yourself in the customer's world and find out the answers to these questions!

## 2.4.3    Challenges and Negative Experiences

What are challenges and what negative experiences have been made? Why? How did it come about? What negative outcome occurred? According to what was it evaluated? By whom? Who was affected? For whom was the event rather negative and for whom was it rather positive? Are there political constellations that you need to understand? Are there specific histories that may go back years, but still shape today's thinking and acting? Are there specific camps on the customer side? Why? How do they differ? Who benefits from what?

It can also be interesting to see what changes have occurred so far. How has the customer relationship developed? Which contacts or interlocutors have changed? How has this affected the relationship and communication? What challenges arose? Why? Have behaviors developed differently? What role does compliance play in this? Were there different assessments of own deliveries and services? Do the views differ with regard to the performance of the provider? Were promises not kept? Were there difficulties in connection with invoices?

## 2.4.4    Important Won and Lost Deals

Why did you choose certain providers in the past and why not? What were the decisive criteria? Who decided? For whom was it a win and for whom rather a loss? Does this also affect your own projects with existing customers? Why did you lose or win yourself?

How do you find all this out? Just ask. You should ask different people about it, in order to get a complete picture and understand different perspectives. Usually you also

get an answer why you (not) won the business. But beware: Not always is this also the truth. Sometimes politeness prevails, and your counterpart is reluctant to tell you the truth directly to your face. That's why you should also talk to other people about it, to compare the different statements. Often you think you know why you (not) won. Clarify such cases and do not rely on your inner voice, because the customer's statement is decisive. I have personally experienced that we won a project, even though we were 30% more expensive than the competition. The customers were willing to pay the higher price, because we could solve the problem more holistically and better. That's why the surcharge was justified, which we could only find out afterwards by asking. This information was enormously helpful for us, because we now knew better what really mattered in this project. Since the win-loss analysis is so insightful, we look at it in more detail.

In addition to questions, observations are also an insightful source of information. How do the customer's interlocutors react to each other, to certain statements, to certain key terms? Who do they listen to? Which statements or arguments are given special importance? What experiences or events from the past are often quoted? What professional beliefs are repeated? What claims are accepted without evidence and why? Where do speech and action noticeably (not) match? Why is this tolerated? By whom? What do the informal structures and paths look like?

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**CASE STUDY Manufacturer of Cooling/Freezing Systems**

**Customer: Food retailer**

- *Value generated for the customer:* For the food retailer (Fig. 2.13), sustainability is an important corporate value. This is to be achieved by reducing environmental emissions. In addition, the handling of the essential production factor (deep-)cooling systems is to be improved. The procurement, repair and maintenance are to become more efficient. Furthermore, the intention is to save costs by using less energy.
- *Challenges/negative experiences:* There were sometimes delivery delays that had to be overcome. There were inconsistencies with the contracts within the service network. A special challenge is also to find and hire new staff for the own service network.
- *Highlights and important information:* An important milestone is that the food retailer has signed contracts to regularly replace outdated cooling systems. Another insight is that the structures of the customer organization are quite hierarchical with a large proportion of commercial employees in the local supermarkets. Otherwise, the internal communication at the customer is rather informal.
- *Important won/lost deals:* An important success was also the establishment of strong, long-term customer relationships. It was also good that both sides could achieve new revenues through the cooperation. The producer of the (deep-)cooling systems also gained access to new markets through the strategic collaboration, as he now reaches not only the discount sector but also the high-quality supermarket segment. ◄

| Value generated at the customer | Challenges/negative experiences |
|---|---|
| • Improve own sustainability by reducing environmental emissions<br>• Increase efficiency in terms of procurement, repair and maintenance of (deep) cooling systems.<br>• Reduce costs through savings achieved by reducing energy consumption | • Delays in delivery<br>• Inconsistent agreements within the own service network<br>• Hiring new personnel for your own service network |
| **Highlights and important information** | **Important business won/lost** |
| • The grocer has replacement contracts in place to regularly replace aging refrigeration systems.<br>• The structures within the customer organization are rather hierarchically organized with a high proportion of blue-collar employees.<br>• Internal communication within the client is rather informal. | • Establish strong, long-term relationships<br>• Generate revenue for both sides<br>• Access to new markets (high-end supermarket segment) through strategic cooperation |

**Fig. 2.13**   Voice of the customer (food retailer). © Hans-Peter Neeb 2022. All Rights Reserved

**CASE STUDY Aviation & Facility Service Provider**

**Customer: Low-cost Airline**

- *Value generated for the customer:* The competitive positioning of the airline in Fig. 2.14 through higher customer satisfaction. The business model was made more efficient by outsourcing further costs. With less delays, the feedback from customers became more positive. The latter was achieved, for example, by new service contracts also with regard to reliable de-icing.
- *Challenges/negative experiences:* Several contracts have to be coordinated that regulate different services in different destinations. The contracts still have rather short-term durations and thus complicate the planning ahead. Lately, there have been changes in contact persons on both the customer and the provider side.
- *Highlights and important information:* Mutual trust and reliability were developed. There is the intention to sign more long-term contracts.
- *Important won/lost deals:* New destinations outside Germany were added. ◄

Usually, one gains these insights through the dialogue with the interlocutors at the customer's side. In personal conversations, one can elicit such peculiarities and obtain the corresponding information. It makes sense, of course, to address the individual points directly and ask questions. What do you do if you have had little or no contact with the

| Value generated at the customer | Challenges/negative experiences |
| --- | --- |
| • Better competitive positioning through increased customer satisfaction<br>• More efficient business model through cost savings via outsourcing<br>• Better customer feedback due to fewer delays (more reliable de-icing) | • Coordinating contracts: Many different contracts for different services in different destinations.<br>• Contracts with short-term maturities<br>• Changes in contact persons on both sides |

| Highlights and important information | Important business won/lost |
| --- | --- |
| • Mutual trust and reliability<br>• Intention to enter into long-term contracts | • New destinations outside Germany added |

**Fig. 2.14** Voice of the customer (low-cost airline). © Hans-Peter Neeb 2022. All Rights Reserved

customer? Then a preliminary work using the voice of the market is required, in order to successively complement it with the voice of the client individually.

### 2.4.5 Voice of the Market (VoM)

The concept of the voice of the market means to conduct an analysis from the outside, in order to understand the customer as well as possible. It is the preliminary work, in order to obtain the actual insights afterwards through the voice of the client.

The VoM can be generated by external research, by interviewing experts, by talking to partners, suppliers or customers and by contacting other interlocutors at the customer's side (sometimes one knows interlocutors in other departments or areas, who can help one), who do not belong directly to the decision-making circle. For the external research, market and industry analyses, analyst reports and publications, press releases or the company's website can serve. However, personal conversations are ideal, because one can best penetrate to the actual core in dialogue. That is why contacts to partners, suppliers or especially customers are so helpful. In addition, these representations should be checked later in the conversation with the customer. For the analysis, tools of digital listening (Sect. 4.4) or social selling (Sect. 4.3) can also be used.

**Win-loss Analysis**

It helps significantly to sell better, if one has really understood why customers have bought or not bought in the past. Therefore, a regular, systematic win-loss analysis is important on both existing and new customer levels. Only in this way can we learn for future situations. The central question is: "What did the customer really buy?" The answers to this question contribute considerably to understanding one's own strengths and weaknesses better. One recognizes new trends in the market or among the competitors, and possible changes in the information and investment behavior of the customers become visible. If we understand the why behind the decision of our customers, we can optimize and improve for the future.

It is helpful to do this analysis in a team, if several people were involved in an account. But the dialogue with the customer himself is crucial. It is important to ask the question directly: "Why did we win/lose?" One may not always get the true answer right away, but a gradual questioning can reveal the real reasons.

**Win Analysis**

In the win analysis, the background or the situation of the sales opportunity is briefly described (Fig. 2.15). The actors (stakeholders) on the customer side, the involved competitors and the communicated value propositions play an important role. The objectives that were to be pursued with the project and the challenges that had to be solved are recorded. In addition to a brief description of the offer, the effects on one's own business are described above all. Winning a customer in a certain market or in the core area is, for example, a positive effect. It is recorded, by which next steps the success can be secured. Finally, it is analyzed, which successes we want to replicate next time and what should be improved. The formats shown in Fig. 2.15 are intended to help structure the questions and serve as a red thread, so that one can focus more on the actual content. They serve as a simple fill-in aid, documentation and standardization of the common language among each other.

- **Background:**
  - Which persons on the customer side were involved?
  - What were their functions or tasks?
  - What role did they have?
  - What unofficial role became apparent?
  - Why were they involved?
  - Were there professional or political reasons?
  - How was the situation?
  - Why were providers requested?
  - For what and to achieve what?
  - What role should the providers take?
  - Which not?

Win Analysis

| Background | Goals to be achieved/ challenge to be solved | Own impact of our success | Our successes |
|---|---|---|---|
| Actors, title, role within the opportunity.<br><br>• What was the situation?<br>• Describe the sales opportunity<br>• Competitors involved<br><br>Our communicated Value proposition | • What goals, intentions or challenges did the client want us to solve?<br><br>• In what should we have made them better? | • A new customer won<br>• Won a particularly helpful customer in a particular market.<br><br>• Won a business in one of our core areas (*sweet spot win*)<br><br>• … | • What did we do so well that we want to do it again next time? |

| | Structure of the business/ offer | Next steps | Our learning effects |
|---|---|---|---|
| | • The terms, products, solutions or services offered. | | • What do we want to do better next time based on the experience? |

**Fig. 2.15** Win analysis. © Hans-Peter Neeb 2022. All Rights Reserved

- – What topic and what business opportunity was it about?
- – What was specifically requested? What not?
- – Which competitors were in the game? Why?
- – What and how did we offer?
- – What were our value statements?
- **Goals to be achieved/challenges to be solved:**
  - – What goals should we achieve?
  - – What challenges should be solved?
  - – What aspirations do we want to achieve together?
  - – Why are we unique to solve that?
  - – How do we improve the situation or the competitive position of our customer?
- **Structure of the business/offer:**
  - – Which product or which offer were placed?
  - – Which additional services or services were offered?
  - – Which arrangements or conditions were formulated?
- **Own effects of our success:**
  - – Did we win a new customer?
  - – Is this new customer significant in the customer's industry or in our market?
  - – Is he an interesting reference?
  - – What relevance does he have for other potential customers?
  - – Is it a win in our core business?
- **Next steps:**
  - – What happens next?
  - – How do we secure the success?

  – How do we limit risks?
  – How do we leverage the success?
  – How do we intensify the relationship?
  – How do we expand the business?
- **Our successes:**
  – What did we do right?
  – What can and should we repeat?
  – Do we transfer experiences to our other existing customers?
- **Our learning effects:**
  – What will we do better next time?
  – Where do we have room for improvement?
  – Do we learn something for our other existing customer relationships?

**Loss Analysis**

The loss analysis (Fig. 2.16) is about finding out the true reasons why the added value was not recognized. Did we miss something? Did we overlook someone? The next steps can describe how we stay close to the customer, to be able to help anyway or to consider how we can still get the business if the winner fails. Sometimes we gain better insights from the loss analysis than from the win analysis. It is important to document these insights transparently and compare them across customers. But this also requires a tolerant, open corporate and error culture. Only then are the participants willing to share failures and the associated insights.

Often the answer is: "It was the price." But this is often rather a misconception, because it is more important to understand why the added value for the price was not recognized

Loss analysis

| Background | Why the value proposition did not add value | Our own impact of our loss | Our successes |
|---|---|---|---|
| Actors, title, role within the opportunity.<br><br>• What was the situation?<br>• Describe the sales opportunity<br>• Competitors involved<br><br><br>Our communicated<br>Value proposition | • What have we really lost with?<br>• What were the real reasons behind price, product, time, budget, etc.?<br>• What did we miss?<br>• Who did we not perceive (sufficiently)? | • New customer for the competition<br>• Have left the competitor in our customers (or he has kept us out).<br>• No new sales opportunity in the near future<br>• … | • After all, was there something we did well to repeat next time? |
| | **Lost offer/business** | **Next steps** | **Our learning effects** |
| | • The terms, products, tsolutions or services offered. | | • What do we want to do better next time based on the experience? |

**Fig. 2.16**   Loss analysis. © Hans-Peter Neeb 2022. All Rights Reserved

or communicated correctly. The price is always relative to the value. If the value is not present or not recognizable from the customer's perspective, then the price does not match the offered performance.

The areas that are the same in the win analysis are not repeated here. Instead, let us take a look at the differences.

- **Why the value proposition did not create added value:**
  - Why did we not achieve added value?
  - Or why did we not communicate the added value clearly to our customer?
  - Where and how did we really lose?
  - What were the real reasons behind mentions like product, price, time or budget?
  - What did the competition do better or understand better?
  - Who did we forget or leave out?
- **Implications of our loss:**
  - Did an important competitor win an important new customer?
  - Did he take a customer away from us?
  - Did he not let us into his customer by protecting his customer relationship?
  - Are there maybe no further opportunities in the near future?
- **Next steps:**
  - What do we learn from this?
  - What do we change?
  - How do we shape the relationship with the customer or business we did not win?
  - Can we meaningfully intensify this relationship?
  - What do we learn about the development of the business our competitor won?
  - Is everything running smoothly?
  - Does the customer's opinion or perception change after all?
  - Does the competitor make mistakes?
  - Does he maybe need our help?
  - Do we learn something for our other existing customer relationships?

  As already indicated above, the customer value is a central aspect that we will discuss in detail in Sect. 2.4.5.

▶   Note
    Understand the customer's decisions and motives, learn from them and speak their language.

The better clarity about the customer's patterns of thinking and acting enables to define what positive role one has for the customer and why, so that one can communicate better in the future.

## 2.5   Customer Value

What really benefits the customer and why? This brings us to the crucial question. So far, we have analyzed what and how the customer wants to achieve it. Now it is about the actual core, about the why of the decision.

The value for the customer or customer value represents one of the most important principles in the decision-making process, because it makes a significant difference what features and benefits a product or service has and what value is generated for the customer as a result. Feature and benefit are determined by the product, the value, however, by the customer. And the value can vary individually from customer to customer.

Features of an offer are quantitative and qualitative characteristics such as dimensions, shape, material quality, functions, etc. These produce a certain benefit for the customer, which arises directly from the offer. It may be that better process costs are incurred, higher quality standards, more flexibility, shorter lead times, etc. The value, on the other hand, is the resulting significant change in the customer's business, in his positioning, in his revenue model, or similar. The value can mean for one customer that he establishes himself better in his market segment, the other customer moves up to number 1, the next one can win new customers, another one can offer new products, another one secures his competitiveness, or similar.

It is important that we recognize and understand the value. It must be formulated and anchored in our value proposition. How this is systematically developed, we will see below in this chapter (Fig. 2.17).

The value often brings about a change of outstanding importance for the customer. For example, his competitive position is significantly strengthened, his offer or service improved, his pricing optimized, a strategic niche occupied or a new target group reached. The benefit enables the value. The benefit can

- be a process improvement to achieve a better offer,
- be a cost reduction to achieve a better pricing,
- be a qualification of the employees to provide a better service,
- be a product optimization to find a better competitive position.

---

**CASE STUDY Microphone Manufacturer**

It is a provider of microphones for technical use. When asking about the special features of these microphones for the customer, it was much about certain frequency ranges, directivity, sensitivity, impedance and other technical features that only experts understand. When asking why these microphones are of such great importance for the customer and why they are indispensable, we quickly came to a special, but simple insight. Only with these quality microphones can the customer maintain his own research and development. This is a competitive advantage for him in the market. Voilà. It was not about technical features, but about the fact that the customer
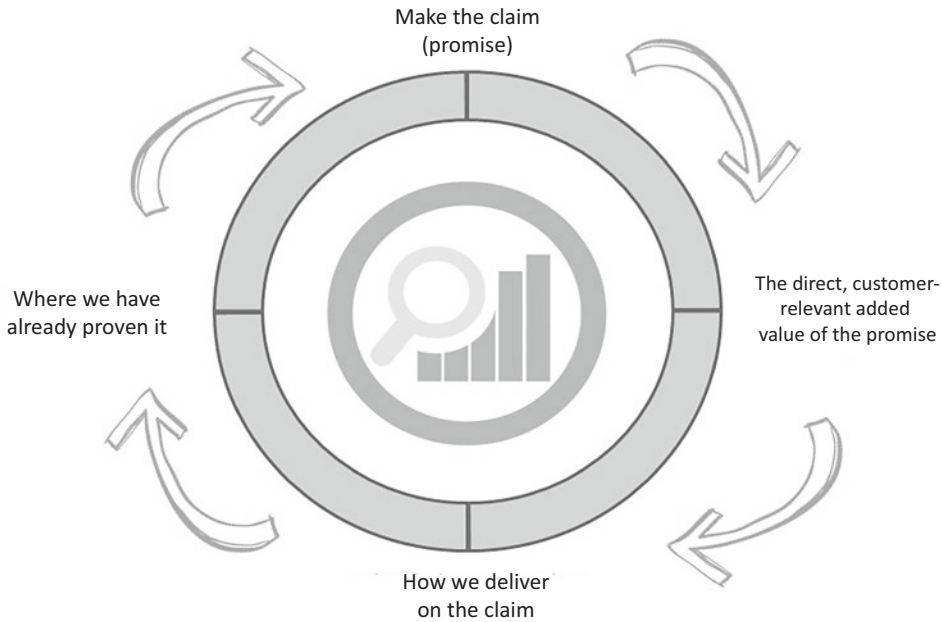
**Fig. 2.17** The value proposition in the AccountJourney®. © Hans-Peter Neeb 2022. All Rights Reserved

can maintain his own competitive advantage through the provider. Just by this state-ment and message, the perception of the provider changed fundamentally at the high-est management level. The case shows that sometimes it is more about insight and impression than about factual knowledge. By conveying this value, the provider gains a new meaning and is perceived more as a partner at eye level.

The value is determined individually by the customer. The same microphone (same features, same benefit) can trigger a different value for another customer. For exam-ple, another customer uses the microphones with the tight tolerances for vibration measurements for quality assurance of his own end products as well as for material testing. This allows poor quality to be detected and corrected immediately. The sat-isfaction of the customer's customers is higher and the measurement can be done on site without external service providers, which saves effort and allows fast response times. ◄

**CASE STUDY Plant Manufacturer**

A customer places a high value on reliability and quality when dealing with a high-quality plant manufacturer. This requirement includes the service area, as they want to avoid expensive downtime and production delays. For this reason, a 24/7 service around the globe is important, so that the plants in Central Asia can also operate

without interruption. A 24/7 service must ensure that fast maintenance or repair and immediate spare parts procurement are possible. The actual added value that is purchased is availability. ◄

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**CASE STUDY Marketing Service Provider**

A customer has a high-priced new product that they want to launch on the market. They still need to describe the target group precisely and develop the performance, the value proposition and a campaign concept. In search of support from a service provider, they talk to both marketing agencies and sales consultants. In the end, they decide on a provider that has both competencies (marketing plus sales) in-house and offers them from a single source, even though they are priced above the competitive offers. The actual value that the customer buys is a well-thought-out concept and a consistent process that enables them to not only generate leads, but also directly convert them into sales. They thus buy the security of being able to transform their product into significant sales in a relatively short time. They want to avoid long conceptual and procedural coordination between actors and partners as well as unnecessary, time delays. This added value based on *full service* and all services from a single source is worth the premium to them. ◄

---

The next question is how to communicate added value so that it is understandable, credible and perceived as sound by the customer. This is done within the framework of value propositions, which are built according to a simple, but necessary system.

► Note
The own added value is the true reason why the customer buys.

The added value is the customer's motivation for their investment. Understanding the added value for the customer is the basis for communicating successfully with the customer and obtaining their investment.

**WHY**

The question of why reveals the added value for the customer. We often talk about how or what and too rarely about why. The why is the actual core, why someone decides or does something. Simon Sinek (2009) has worked out this connection in the Golden Circle. He puts the Why in the center of the consideration before we worry about the How and What (Simon Sinec Inc., 2020). The why is the core. We have to find that out.

Example questions can be:

1. Why? What for? For what reason?
2. What is the motivation?

3.  What is the reason or motive? For which reason?
4.  What is the background? What is the occasion?
5.  What are you doing this for?
6.  What is the intention?
7.  What do you want to achieve?

Sometimes you have to ask the question of why up to three times to find out the true core and to be able to develop a value proposition.

We want to give our statements clarity, comprehensibility and credibility, so that they are heard and trusted. A value proposition should communicate the added value systematically, so that the customer not only perceives it, but also understands it (Fig. 2.17). We want to give them the assurance that we can also fulfill the promise. The simple, but systematic structure of a value proposition enables this.

Value propositions are not created by a creative process on the green field. Value propositions are systematically developed in four steps. First, we formulate the promise, then the resulting added value. In the third step, we describe how we will deliver on the promise and finally give examples of where we have already successfully implemented it.

The idea is to formulate a relevant value proposition, to communicate the value for the customer in an understandable way and to explain how it will be successfully implemented. In addition, it is about providing evidence of why the provider is capable of fulfilling the value proposition. It is about simplicity, clarity and comprehensibility.
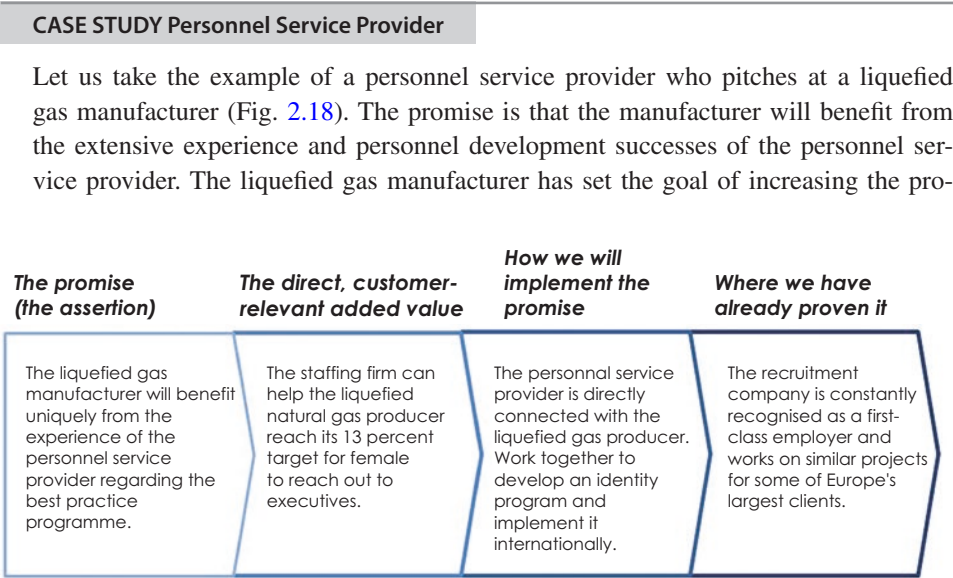
**CASE STUDY Personnel Service Provider**

Let us take the example of a personnel service provider who pitches at a liquefied gas manufacturer (Fig. 2.18). The promise is that the manufacturer will benefit from the extensive experience and personnel development successes of the personnel service provider. The liquefied gas manufacturer has set the goal of increasing the pro-

| The promise (the assertion) | The direct, customer-relevant added value | How we will implement the promise | Where we have already proven it |
| --- | --- | --- | --- |
| The liquefied gas manufacturer will benefit uniquely from the experience of the personnel service provider regarding the best practice programme. | The staffing firm can help the liquefied natural gas producer reach its 13 percent target for female to reach out to executives. | The personnal service provider is directly connected with the liquefied gas producer. Work together to develop an identity program and implement it internationally. | The recruitment company is constantly recognised as a first-class employer and works on similar projects for some of Europe's largest clients. |

**Fig. 2.18** Communicating value propositions (customer: liquefied gas manufacturer). © Hans-Peter Neeb 2022. All Rights Reserved

portion of female managers to 13% by 2018. The added value of the promise is now that the service provider will help the liquefied gas manufacturer achieve this goal. To successfully deliver on the promise, the service provider will work closely with the industrial company, develop and implement a successful program. As proof, the personnel service provider can cite both its own above-average proportion of female managers and successful projects with similar organizations of this size that are on track to achieve this goal. This simple system allows to structure and sort the thoughts and to build a well comprehensible and credible communication towards the customer. ◄

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**CASE STUDY Manufacturer of Frozen/Refrigeration Systems**

The food retailer wants to improve its sustainability (Fig. 2.19). The producer of the frozen/refrigeration systems can help with this. By completely replacing the existing refrigeration systems with plug-in refrigeration systems, this goal can be achieved. The producer offers to replace all systems in all supermarkets and maintain them in the future. He has already proven this solution by reducing the energy consumption of the new systems by 40% at a competitor. ◄

---

**CASE STUDY Aviation & Facility Provider**

The low-cost airline needs to save costs to lower prices (Fig. 2.20). This way, it wants to attract passengers from other airlines. The variable costs can be reduced by reducing the turnaround times of the planes on the ground. The provider has already successfully proven this on other occasions. ◄

▶   Note
    Consistent value propositions enable to maintain the customer's trust.

| *The promise (the assertion)* | *The direct, customer-relevant added value* | *How we will implement the promise* | *Where we have already proven it* |
|---|---|---|---|
| The food retailer will achieve its goal, which is to constantly improve its sustainability | The food retailer has a unique opportunity to reduce his energy consumption by using plug-in refrigeration systems. | All previous cooling systems are replaced by better, plug-in cooling systems and maintained by the unique service network. | The energy consumption of a competitor could be reduced by 40% in the last years by using the plug-in cooling systems. |

**Fig. 2.19** Communicating value propositions (customer: food manufacturer). © Hans-Peter Neeb 2022. All Rights Reserved
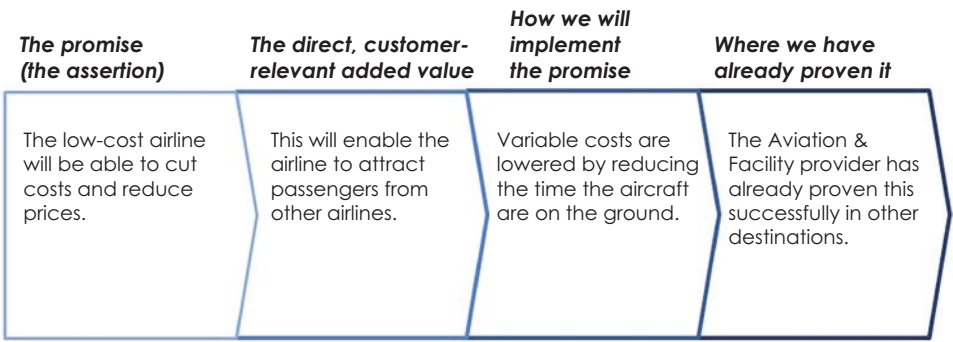
|  | **How we will** |  |
| **The promise** | **The direct, customer-** | **implement** | **Where we have** |
| **(the assertion)** | **relevant added value** | **the promise** | **already proven it** |

| The low-cost airline will be able to cut costs and reduce prices. | This will enable the airline to attract passengers from other airlines. | Variable costs are lowered by reducing the time the aircraft are on the ground. | The Aviation & Facility provider has already proven this successfully in other destinations. |

**Fig. 2.20** Communicating value propositions (customer: low-cost airline). © Hans-Peter Neeb 2022. All Rights Reserved

A comprehensible narrative story about the value proposition makes it easier for the customer to understand that the added value is the right one for him and that he can trust that it will also be delivered and that his investment is worthwhile.

> **Strategy Development with the ANA Method**
> Those who want to read more about their own positioning and strategy are recommended the practice-oriented ANA method (Neurohr, 2012), which refers to five basic strategies with practical examples. ANA stands for Achilles heel, neutralization maneuver and attack maneuver. In particular, challengers in saturated markets are considered, who have prevailed against market leaders and thus caused innovative changes. They have questioned and redefined the rules in their markets. They have neutralized the strengths of the competitors and surprisingly made their own strengths the new industry narrative. The conceptual approach is inspiring and very vivid using the situation window.

## 2.6   Account Status

Finally, we want to define what we want to achieve with the customer and the individual persons. To do this, we conduct an account analysis and derive goals and intentions from it. In this way, the concrete next steps are defined, which determine our activities in practice. The implementation is now in the foreground.

### 2.6.1   SWOT Analysis

An important aspect is also to assess one's own situation correctly. To do this, one can use the simple tool of SWOT analysis, by analyzing one's own strengths (*Strengths*), weaknesses (*Weaknesses*), opportunities (*Opportunities*) and threats (*Threats*) and documenting them in a matrix. Since the SWOT analysis is generally well known, no detailed explanations are necessary here. The crucial point, however, is to derive the right strategies and concrete measures from the four dimensions and fields of action. Thus, one obtains an activity-driven list.

A SWOT analysis is relatively quickly created and serves as a helpful tool. The advantage is the joint view of the team, because it is a good scheme to document the common knowledge and capture aspects that were not so clear to oneself, but that colleagues have in mind.

---

**CASE STUDY Customer Food Retailer**

- **Strengths:** As strengths, the provider can demonstrate the flexibility through its own working time account model (Fig. 2.21). This makes it better able to respond to the customer's order requests. Furthermore, the customer's expansion in Europe can be accompanied by the reliable service network. The cooling systems can be individually adapted, so that the customer can better place its own brand. The scale effects in the service delivery ensure the customer permanently competitive prices.
- **Weaknesses:** The service network is not as efficient outside Europe. The unfamiliarity of our brand can make it difficult for the customer to perceive us as an environmentally friendly brand.
- **Opportunities:** The customer has additional requirements in the future that need to be met.
- **Threats:** The development from the stationary supermarket model to the delivery services can endanger the business with the stationary cooling systems. The political tensions in Ukraine can question the customer's expansions and thus the own opportunities.

The next step is to derive a SWOT strategy based on the SWOT analysis. To do this, one now looks at which own strengths can help to exploit the opportunities. Furthermore, one checks which additional strengths need to be developed to mitigate the weaknesses and thus exploit the opportunities. On the other hand, one analyzes which own strengths help to reduce the threats. In addition, one checks which further strengths need to be built up to counter the threats or to change the playing field. ◄

The SWOT strategy based on the SWOT analysis now defines four fields of action and formulates concrete measures. This approach is less widespread, although it is not complicated. The step is important, however. Because the analysis only has a current state

| Strengths | Weaknesses |
|---|---|
| • Adapting our workforce to the customer's ordering behavior through the working time account concept.<br>• Supporting the expansion of the grocer with reliable after-sales service from our network throughout Europe.<br>• Enable the grocer to customize its refrigeration equipment,highlighting its private label products, to create and exploit new niche markets.<br>• Ensure consistently competitive pricing for customers through our significant economies of scale in production, R&D, overhead and service organization. | • Except in Europe, our service network is not yet mature if the customer wants to expand worldwide (e.g. Asia).<br>• We are a fairly unknown company that may not be recognized as an environmentally friendly brand by the grocer and its customers. |
| **Opportunities** | **Threats** |
| • Meeting the customer's future requirements through our own standards for environmental management.<br>• We will take the client's "Eco Building" concept to the next level by replacing the refrigerators with our superior plug-in refrigerators, resulting in a 30% reduction in carbon emissions. | • The industry's increasing delivery service e-commerce activities could significantly reduce the use of plug-in refrigerators.<br>• Political issues in Eastern Europe, such as the Russia-Ukraine conflict, pose a potential threat to the customer's expansion plans. |

**Fig. 2.21** SWOT analysis (customer: food retailer). © Hans-Peter Neeb 2022. All Rights Reserved

view as a result, we now reach the action level with the SWOT strategy to make concrete plans and steps.

---

**CASE STUDY Customer Food Retailer**

- **Use strengths to transform opportunities:** The provider must be able to successfully address the future requirements of the customer (Fig. 2.22). He will be able to do this by means of his innovation capability and his strong service network. The planned "Eco Building" idea will be implemented by the provider through the saving potentials based on technology and scale effects.
- **Use strengths to mitigate threats:** The provider should try to introduce his systems especially in the eCommerce hubs that are used for the delivery service, in order to weaken the future impacts of the delivery trend. Geographically, he should focus more on the western areas and the capital of Ukraine. Whether this can really be a solution, is not sure.
- **Build strengths to exploit opportunities:** Use the cooperation with the customer to expand and strengthen your own service network in Asia. Use performance proofs of the systems and references of other customers to position yourself as an environmentally friendly brand more strongly.

| SWOT Matrix | Strengths | Weaknesses |
|---|---|---|
| **Opportunities** | The future requirements of the customer are made possible by our innovative as well as individually adaptable cooling systems of our reliable after-service network.<br><br>The customer's planned "Eco Building" concept is made possible by the savings potential of our technology and our economies of scale. | Use the customer relationship and joint development to expand the network in Asia.<br><br>Use performance records and existing references to prove to customers how much we can help them become an environmentally friendly brand. |
| **Threats** | Targeted use of our refrigeration systems in eCommerce hubs for delivery so that the impact of the delivery trend will not be as severe.<br><br>Establishment/expansion of the service network in the safe western areas of Ukraine and in Kiev. | Develop new solutions for mobile cooling through product innovation.<br><br>Organize service more from Poland and hybrid model. Discuss Russia as an expansion alternative. |

**Fig. 2.22** SWOT strategy (customer: food retailer). © Hans-Peter Neeb 2022. All Rights Reserved

- **Face weaknesses and threats by changing the playing field:** Develop new solutions for mobile cooling for the delivery service through innovation. Possibly organize the service for Ukraine partly from Poland, to remain flexible. In addition, Russia can be analyzed together as a field of expansion. Such options sometimes lie far outside one's own sphere of action or that of the customers. But it shows the customer one's own strategic thinking in option fields and thus the added value that one has as a partner for him. ◄

## 2.6.2   White-Space Analysis

The white-space analysis is a first, simple tool to visualize and identify possible cross-/up-selling potentials. This makes sense especially when one's own offer has a broad spectrum of products and/or services. For a one-product offer, the step is obsolete. Depending on the complexity, one considers products or product areas and services or service areas.

One can perform the analysis from different perspectives. On the one hand, the different areas (Fig. 2.23) of the customer are analyzed, on the other hand, one can examine different geographical regions of the customer or make other suitable groupings. For larger customers, the geographical analysis makes sense. Customer regions can be con-
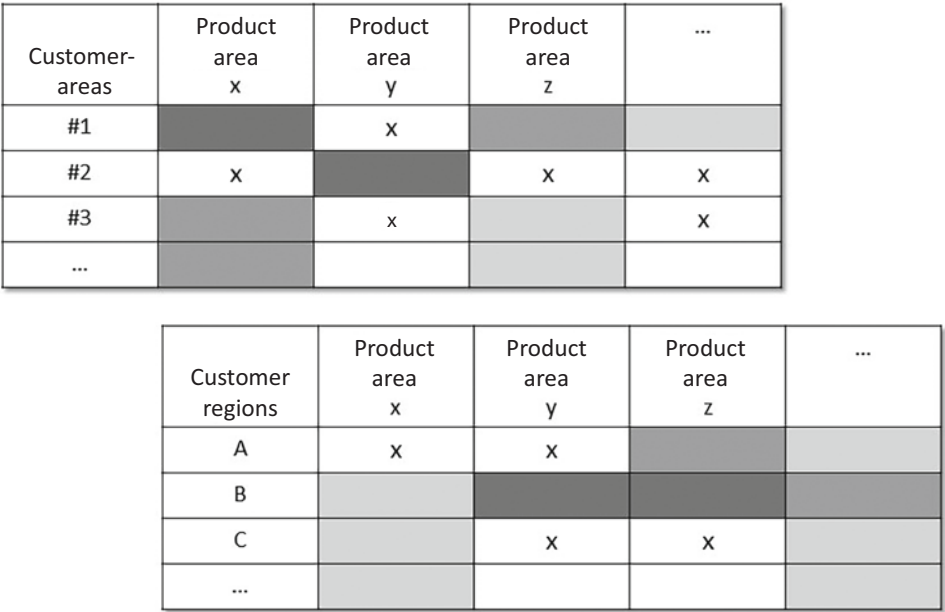
| Customer-areas | Product area x | Product area y | Product area z | ... |
| --- | --- | --- | --- | --- |
| #1 | [dark gray] | x | [gray] | [light gray] |
| #2 | x | [dark gray] | x | x |
| #3 | [gray] | x | [light gray] | x |
| ... | [gray] |  | [light gray] |  |

| Customer regions | Product area x | Product area y | Product area z | ... |
| --- | --- | --- | --- | --- |
| A | x | x | [dark gray] | [light gray] |
| B | [light gray] | [dark gray] | [dark gray] | [gray] |
| C | [light gray] | x | x | [light gray] |
| ... | [light gray] |  |  | [light gray] |

**Fig. 2.23** White-space analysis (simplified example). © Hans-Peter Neeb 2022. All Rights Reserved

tinents, countries or groups of countries, depending on how the customer is structured. However, only significant regions that make up a significant share of the business should be considered, in order not to get lost in details.

In the other dimension (here recorded in the columns) one lists the essential components of one's own offer. It is then noted accordingly whether the respective offer is strongly represented (dark gray), represented (gray), slightly represented (light gray) or not present at all (white or "x") in the area. The white and light gray areas are now to be examined more closely. The question arises whether the offer makes sense, whether it has already been placed once, whether there are reasons for the absence or what strategy one can develop to systematically build up the offer here with the customer. The white areas can provide approaches to identify cross-/up-selling potentials.

One should also consider how to protect the dark gray and gray areas with the customer. Especially interesting is the question whether one can vertically transfer recommendations and positive references from (dark) gray areas to the underdeveloped areas, in order to systematically expand the business.

The rows also play an interesting role. For example, if a customer already takes advantage of an offer in one area, one can check whether this can also be transferred to the other areas, especially since there may already be framework contracts that can be used for both sides in a profitable way. Here, too, the white or light gray areas should be analyzed more closely.

**CASE STUDY Customer Personnel Service Provider**

The customer's area #1 mainly uses the high-quality recruiting solutions and the payroll services (Fig. 2.24). In addition, he uses vendor management services. Temporary employment (TE) solutions and after placement services are not or weakly used. Here the question is whether there is a comprehensible reason for this or whether it is usable cross-selling potential.

In the customer's area #2, it looks quite different. Here, mainly the TE solutions and to a lesser extent the payroll services are in demand. High-quality recruiting solutions, vendor management and after placement service play no role at all. First, it is necessary to find out whether there is a valid reason for this or whether one is simply giving away cross-selling potential. The areas may well have very different needs—or not. Interesting are, for example, high-quality recruiting solutions and vendor management, because the sister area of the customer has high or medium demand for them. Thus, there are experience values and contractual agreements with the colleagues. Both are useful and could build the bridge.

In the customer's area #3, high-quality recruiting solutions and a little vendor management are in demand. So far, white spots are TE solutions, after placement services and payroll services. Here, too, one can question why the last three mentioned offers are not (yet) used by the customer. Is there no need or is there still untapped cross-selling potential? Also interesting is the question whether one should especially focus on the TE solutions, payroll services and also the high-quality recruiting solutions, because they are particularly strongly demanded by the colleagues at the customer in the other areas. Why should this not also be possible in the third area?

| Customer areas | High quality recruiting solutions | TE solutions | Vendor management | After Placement Services | Payroll services |
|---|---|---|---|---|---|
| #1 | | x | | | |
| #2 | x | | x | x | |
| #3 | | x | | x | x |

| Customer Regions | High quality recruiting solutions | TE solutions | Vendor management | After Placement Services | Payroll services |
|---|---|---|---|---|---|
| A | x | x | | | x |
| B | | | | | x |
| C | | x | x | | x |

**Fig. 2.24** White Space Analysis (Customer: Personnel Service Provider). © Hans-Peter Neeb 2022. All Rights Reserved

In the customer's region A, vendor management and after placement service are used a little. However, high-quality recruiting solutions, TE solutions and payroll services are not in demand. Again, the question arises whether there is indeed no need, this is covered by the competition or it has simply not been aroused yet. It could be cross-selling opportunities that one should examine and use more closely.

In region B, TE solutions and vendor management are used intensively, after placement services moderately and high-quality recruiting solutions to a small extent. Only payroll services are not used. We investigate whether there is a need for payroll services in the region and whether we can, for example, strengthen high-quality recruiting solutions.

In the customer's region C, high-quality recruiting solutions and after placement services are in demand a little. There is no operational business relationship for the topics TE solutions, vendor management and payroll services. Particularly interesting is the case of payroll services, which are not in demand by the customer at all. Does the customer have no cross-cutting need? Is a competitor commissioned with it? Have we not addressed this yet? What real potential is still hidden there? ◄

One can see that the white space analysis raises very concrete questions in a simple and clear way, which one can successively work through and answer. Either there are reasons why the product is not in demand, because sometimes products exclude each other or are not sensible for other reasons. Or one has quickly found a possible starting point for future cross-selling. However, another aspect should be considered, because political games and tensions also play a role. Not every colleague at the customer can be asked whether the other area can get experience values or whether one can issue a positive reference. Some areas or persons simply do not get along for different reasons, so that there are quite different barriers. Possibly, this is exactly why they work with a competitor.

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**CASE STUDY Customer Low-cost-Airline**

For the low-cost airline, we look at the example for the German market based on some destinations (Fig. 2.25). It is important to know that in the two destinations Munich and Bremen, the two services ticketing and de-icing cannot (marked with "/") be offered. This has operational-technical reasons and excludes these options at the locations. Otherwise, we can see that in Munich, the aircraft interior cleaning and de-icing are used by the customer, in Bremen, the cabin equipment, in Berlin and Cologne/Bonn, the ticketing, and in Hamburg, the catering for the passengers and in Frankfurt, the de-icing are used by the customer. White, empty fields give reason for analysis, whether there is a cross-selling opportunity there, this service is already covered by the competition, there is no demand for some reason, or we have not made the offer yet, although the customer might have an unspoken interest in it. In this way, one can systematically examine the possibilities with the customer in a simple way, where there might be approaches to actively discuss further services, because there is a need for them. ◄

| Customer destinations | Facility services | Aviation | | | |
| --- | --- | --- | --- | --- | --- |
| | Catering | Airport service | | Ground service | Passage Service |
| | Passenger catering | Aircraft interior cleaning | Cabin equipment | De-icing | Ticketing |
| Munich | | ✔ | | ✔ | / |
| Bremen | | | ✔ | / | |
| Berlin | | | | | ✔ |
| Cologne/ Bonn | | | | | ✔ |
| Hamburg | ✔ | | | | |
| Frankfurt | | | | ✔ | |

**Fig. 2.25** White Space Analysis (Customer: Low-cost-Airline). © Hans-Peter Neeb 2022. All Rights Reserved

### 2.6.3   Performance and Business Outlook

In order to be able to draw and monetize the future picture, one has to examine the performance indicators for the individual customer. It is important to define some key indicators for his industry. In Fig. 2.26 one can see a very simplified representation from the area of personnel services. Based on the individual ratios, one can determine in which areas one has achieved an improvement or deterioration. Now one can specifically analyze causes and take appropriate countermeasures. On this basis, a business outlook is possible.

To concretize these values, a list of the current opportunities that are being pursued with this customer is also part of it.

▶   Note
Systematically develop the strategic leeway and identify further opportunities.

## 2.7   Analysis of the stakeholders

In sales, it is not only about neutral companies and their objectively measurable goals, but always also about people with their individual personalities, skills, interests and intentions. In addition, several people in different roles are often involved in decisions. They also have relationships with each other and have different tasks. This network of

| Growth rate (Qrtl.) | Cancellations | Current rankings |
|---|---|---|
|  |  |  |

| Number of meetings | New placements | Placed offers |
|---|---|---|
|  |  |  |

| Ratios | | |
|---|---|---|
| Jobs: Placements | Jobs: Interviews | Send Outs: Interviews |
|  |  |  |



**Fig. 2.26**  Performance and Business Outlook. © Hans-Peter Neeb 2022. All Rights Reserved

interdependencies needs to be recognized, made transparent and understood. While we have looked at the company in the previous chapters, we now look at the level of the individual people and players. It is mainly about the people. In B2B sales or key account management (KAM), we usually deal with so-called buying centers or decision-making circles. People with different roles from different areas are involved and have decision-making authority.

A *buying center* is a group of people who are involved in a purchasing decision. Typically, people are involved in the buying center based on their function, because they have a content-related connection or responsibility to the topic, or because of their personal influence in the organization, to pave the way for a decision internally and to avoid

unnecessary resistance. *Buying centers* are often composed of people from different departments or teams, to consider different facets of a decision. For example, a buying center may involve one or two people from the respective functional area, someone from the finance area (e.g. CFO), someone from the operations or the COO, and someone from the purchasing department. Depending on the topic, the human resources, marketing/sales, or product area may be represented. For important decisions, the CEO or board of directors is naturally also involved. People are integrated who have to support and implement the decision later. They should be able to contribute their aspects, formulate their requirements, and express their constructive criticism from the beginning. In corporations, *buying centers* are often also officially called *steering committees* or similar. Sometimes it is worth asking the customer why which people are involved in the *steering committee* for what purpose. It is amazing what you can learn if you just ask the right person at the right time. That there are different roles such as sponsor, decision maker, decision preparer, influencer, advisor/expert, user, etc., we will discuss in Sect. 2.7.3 later. Depending on the phase and process, the composition of the *buying center* may occasionally vary, but this is rarely the case.

If possible, the analysis and assessment of the decision-making circle should be carried out jointly by the team colleagues on the provider side, as this increases the likelihood that essential insights will be perceived. It can happen that a colleague has recognized something that others have overlooked. It is especially interesting when the observations or evaluations are diametrically opposed. The discussion about the reasons for the divergent perception can be very revealing. Such disagreements offer particularly valuable potential for aspects that should be observed or questioned more closely with the customer. Such team analyses are very important and insightful.

### 2.7.1   Power Interest Matrix

Within a *buying center*, the individual people have different roles and can be divided into different groups. Each of these groups has a different meaning and must be treated differently. First of all, we divide the actors according to two criteria, which evaluate the decision-making power (*power*) and the personal interest (*interest*) in the topic. The criterion power is plotted on the Y-axis, the criterion interest on the X-axis. Within the framework of the power interest matrix (Fig. 2.27), we thus obtain four segments A to D, into which the customer's contacts can be classified. None of these segments is unimportant, but only individually different.

The criterion **Power** (Y-axis) indicates how much official or unofficial decision-making authority the actor has in the organization to enforce decisions. People with great power are plotted in the upper area in A or B and people with little power in C or D. Someone who has little direct decision-making authority, on the other hand, can be an important decision preparer. For certain investments, these actors can play a significant
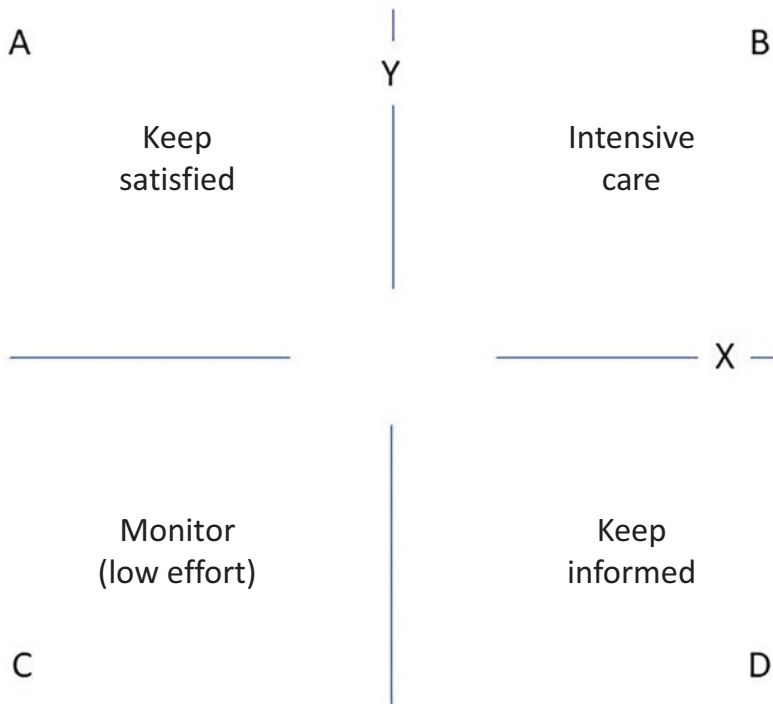
**Fig. 2.27**   Power interest matrix. © Hans-Peter Neeb 2022. All Rights Reserved

role, especially if they have special expertise that a decision maker relies on. It may be that due to this constellation, the decision preparer has a greater importance than the actual decision maker. Often, the CEO does not have the greatest power on certain top-ics, because he does not want or cannot make the topic his own, for example, to avoid bypassing someone or to not relieve an employee of his responsibility. The criterion of power is strongly influenced by the customer side and can hardly be influenced exter-nally by the provider.

Power can be derived officially from the role or function. But it can also be an unof-ficial power, for example, a person who is listened to, even though they are not high up in the hierarchy. These can be people who usually have an advisory role internally, who bring a lot of experience, who have a long history, who may have been in an officially powerful position in the past, or who otherwise often contribute important thoughts to decisions.

Power means in this context, having the possibility to enforce decisions even against resistance. For example, if two people have the same arguments for and against an option, the person who has more power can enforce their will. Power can also mean imposing one's own will on other people more or less directly, so that they join one's

own attitude. These relationships need to be recognized and understood. Where are the official and unofficial power centers or power islands?

The second dimension is the criterion interest (**Interest**) on the X-axis. It evaluates how much interest the respective person has in the topic and whether the topic is within their immediate area of responsibility. People with high interest are entered in the Power Interest Matrix on the right in B or D and people with low interest in A and C. As important as it sometimes is to know high-profile executives in the organization, it is equally important to know the people responsible for a topic. It is useless to place a topic several levels higher in the hierarchy, where it is too far away from one's own desk in terms of content. The CEO, for example, is the wrong contact person for certain topics. This means the interest in the topic, not in oneself as a provider. The interest also concerns the other providers who can make a relevant contribution to the topic. This dimension can be influenced to a certain degree by the provider. In particular, the importance for the respective area of responsibility of a person and the impact on the personal goals of the decision maker must be communicated clearly. This can increase his/her interest more. By the influence of the provider, there can be a certain "right shift" of decision makers in this way.

But how can one find out the dimensions *Power* and *Interest*? Quite simply, by listening and asking specific questions. The interest in a topic can be heard relatively quickly. For the aspect of power, there is the possibility to observe the discussion culture at meetings with several people and to follow the response to certain statements. It is also important who speaks how often and who starts to speak. These can all be clues that indicate the power factor. In addition, it is also possible to find out by simple inquiry in a meeting or in a confidential conversation who usually makes such decisions and who else needs to be asked. For this purpose, these questions are especially suitable: "Who else should we involve from you internally?" Or: "For whom should we take some time to present this calmly?" These statements should, however, be cross-referenced with other people to understand whether the picture is consistent or whether there are different, individual agendas. Only in this way can one get a complete picture from a mosaic.

There are question approaches to get answers for the dimensions Power and Interest. Sometimes, however, one has to read between the lines in the answers. One should select suitable questions from the long list for one's project. In some situations, one cannot ask certain questions because they are not goal-oriented or too (in-)direct. This depends, among other things, on how far the degree of relationship with the person has already progressed. It might be advisable to ask such questions only in a one-on-one conversation.

**Questions on the Dimensions Power and Interest**

A. **Power**
   1. Are there decisions that are made without you? Which ones?
   2. Which decisions are not made without you?
   3. Who else should we involve on your side?
   4. For whom should we take some more time to present this calmly?
   5. Whose approval do we still need for a project success?
   6. Who is interested in the outcome of this project?
   7. How is the decision-making process in your house in this case?
   8. Who signs after you?

B. **Interest**
   1. Who has the greatest interest in the success of this project?
   2. How important is this project to the CEO (or your boss)?
   3. What would the CEO (or your boss) do if you cancel the project?
   4. How will the executive level evaluate the success of this project?
   5. Is the success of this project in the target criteria of your boss (or your management)?
   6. Is this project on the top 5 list of your boss (or your management)?
   7. How does the management support the success of this project?
   8. Is there a steering committee? Who are the people involved?

This results in the strategy "intensively care" for the segment B on the top right with great decision-making power and great interest. The strategy "keep satisfied" applies to the segment A on the top left with great decision-making power and low interest. The strategy "keep informed" applies to the segment D on the bottom right with lower decision-making power, but great interest. The strategy "monitor" applies to the segment C on the bottom left with low decision-making power and low interest.

An interesting aspect of the topic of power is also the change of this status. A promotion, for example, can automatically be associated with a shift upwards. However, it is possible that this shift only occurs over time, when the person starts to prove themselves. At least in such cases, some dynamics and a change in the power structure can be expected. Likewise, special events, extraordinary deals or particularly successful projects can contribute to the fact that (informal) power structures are set in motion. Thus, it may be that a person moves (somewhat) upwards in the matrix. Just as well, negative news or failures can contribute to the fact that the star of a person in the matrix "sinks". Such information and news are important to adjust the classification of people.

**CASE STUDY Customer Liquid Gas Manufacturer**

Naturally, the two people in the human resources department, Chief HR Officer and Director Global Diversity, have the greatest interest in the solution, according to Fig. 2.28, even if not the greatest power. It is interesting here that, as in some companies that are more financially driven, the CFO has a high volume of power. Unfortunately, he does not have the greatest interest in this topic. The CEO, on the other hand, has the greatest power and also knows about the importance of the topic, because it is not easy for the company to find qualified staff. For purchasing, the topic also does not have the highest priority, but he represents a power factor to be considered.

Thus, the decision-makers in the human resources department and the CEO are the essential chess pieces. The relationship with these people must be built and stable. They must be kept particularly informed. They are the ones who matter. In particular, it should be checked whether the attitude and interest of the CEO can not be increased. With regard to the CFO and purchasing, it is also worth considering how the interest can possibly be increased. Maybe there are contract options that make the ongoing costs more attractive and reduce the effort for purchasing. ◄

**CASE STUDY Customer Investment Bank**

The Chief Information Officer (CIO) and the *Chief Investment Officer* have the strongest interest in the project and relatively large influence, according to Fig. 2.29. The interest of the *Strategy Head* is also high, although his influence is lower. The CEO is most clearly interested and supports it with his power. It is a strategic move. The CFO is interested in saving significant costs with the deal. Only for purchasing, the topic is a matter like many others. The situation looks relatively comfortable. ◄

**CASE STUDY Customer Food Manufacturer**

The CFO has a low interest in the topic, as can be seen in Fig. 2.30. He would rather allocate the budgets to other strategic investments. His decision-making power is also very high. This already indicates a challenge. The CEO has an interest in the topic of sustainability, and his personal influence is very high. The sales department has a great interest, because they can position themselves as very sustainable towards the customers, but the power of the sales department on this topic is rather limited. The greatest interest and power has the COO. Due to the comprehensive contract, which regulates the exchange and maintenance geographically, he sees many arguments for the project. It is similar with the Regional Manager, who is responsible for an important region. He can also address and convince the customers much better with the sustainability topic. The strategic purchaser also has an interest in the initiative and his power is also clearly present. It should be noted again that the interest in the topic is meant, not the interest in the provider, because the interest can be covered by a
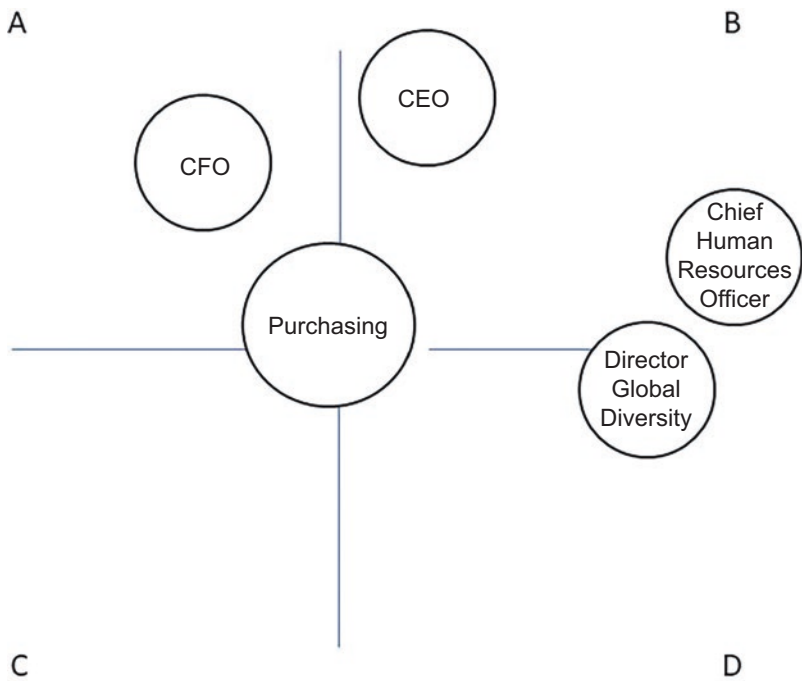
**Fig. 2.28**   Power Interest Matrix (Liquid Gas Manufacturer). © Hans-Peter Neeb 2022. All Rights Reserved

competitor just as well. Only in the next consideration within the framework of the fan principle, the attitude towards the provider is evaluated. The interest only assesses whether the person is a relevant contact person for the topic at all.

The question arises whether the attitude of the CFO can be influenced positively in any way. The salesperson seems to be a supporter, but with limited influence on the decision. The three key persons are thus the COO, Regional Manager and the strategic purchaser. It depends on them whether they assert their interest against the CFO. These persons must be provided with the right information, and the relationship with them must be maintained. The trust in the provider must be built and maintained. The CEO has a medium interest and great influence. He can also play an important role in the decision. The relationship with him is important and must be built or maintained. ◄

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**CASE STUDY Customer Low-cost-Airline**

The greatest interest in the solution has, as can be seen in Fig. 2.31, the COO, who can find a solution for his ground operations in several countries and destinations, to reduce costs and turnaround times. His *Ground Operations Director* supports him with the attitude, even if his power is not comparable. The CFO also has an interest in the solution, because it reduces operational costs and relieves the air-
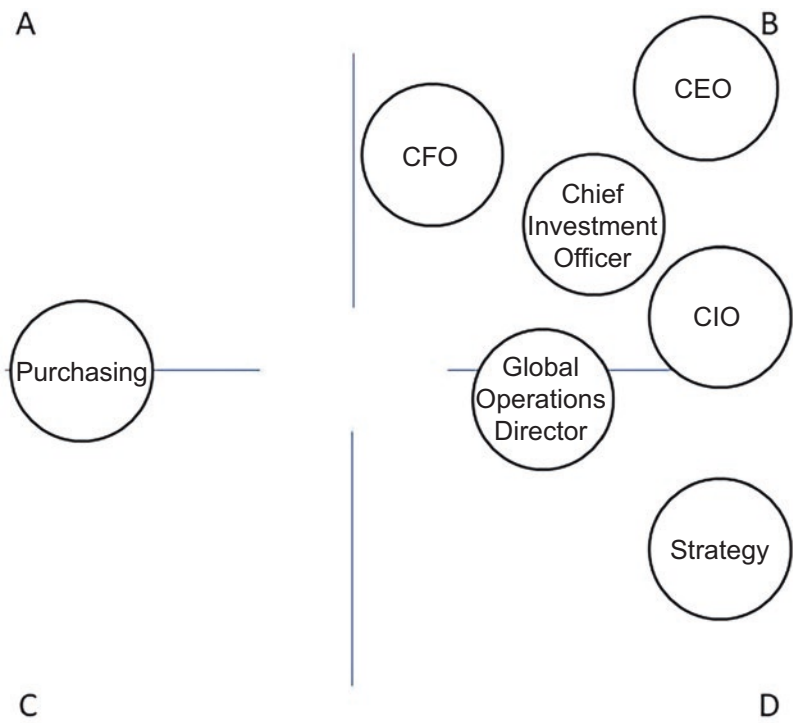
**Fig. 2.29** Power Interest Matrix (Investment Bank). © Hans-Peter Neeb 2022. All Rights Reserved

line financially. Strategic purchasing finds with the solution a strategic partner, who brings a broad service offer for many destinations. The interest of the CEO is to position the airline better and make the business model more attractive, whereby the solution helps him. Sales also has an interest in the initiative, because through the cost optimizations, lower prices can be designed and thus more passengers can be won. ◄

### 2.7.2    Fan Principle

An exciting question is how the individual persons relate to us as a provider, to our offer and the communicated customer value. Who is in favor, who is against and who might even be a fan of us? (Becker & Daschmann, 2016). With this insight, one gets the leverage of active supporters who want to achieve the same goal with us and can even help. The great art is to turn a customer into a fan. However, one has to first recognize these fans and then activate them. Fans of a company are more satisfied and connected to the provider than average customers. Sympathizers are similarly satisfied and
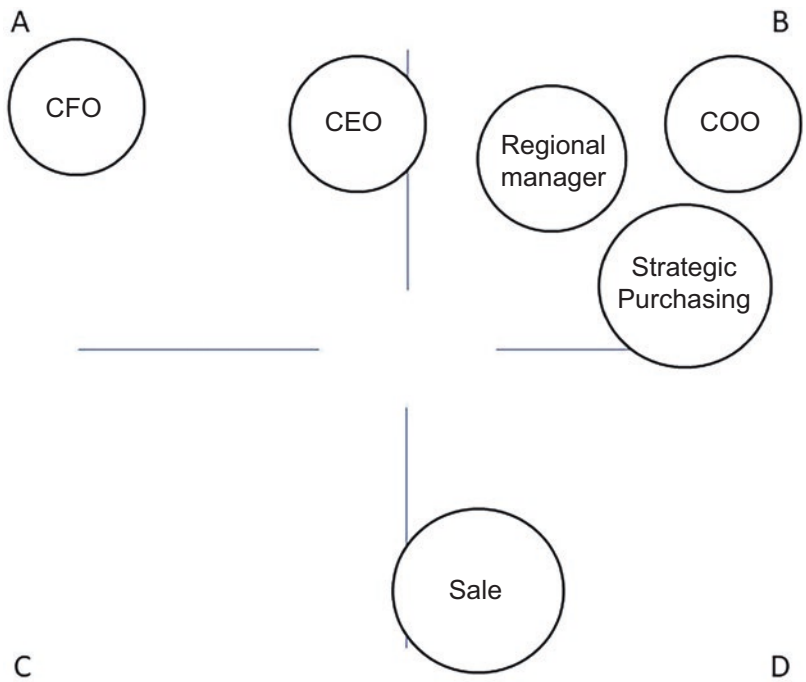
**Fig. 2.30** Power Interest Matrix (Food Manufacturer). © Hans-Peter Neeb 2022. All Rights Reserved

connected, but they express it less than fans and are also less noticeable. Sympathizers and fans (Fig. 2.32) are so important because they help us to understand the customer as a whole, to recognize the structures at the customer, to develop the actual customer value, to understand the language of the customer. They help us to make it easier for the customer to buy. Studies show that on average 43% belong to the sympathizers and even 15% can be fans—top values can go well beyond that. It is important to understand that the persons of the buying center on the customer side can have different perspectives on the provider, which can diverge (significantly) in part. Recognizing these differences is crucial.

- Fans can also be very good recommenders, for example when it comes to establishing contact with colleagues in other business areas, because they have had good experiences themselves. Interestingly, it is not always easy for the customer to justify why exactly he is a fan. Many reasons are emotional and not immediately rational to explain and formulate. They are valuable because they are usually willing to recommend someone else because of their satisfaction and emotional attachment. They are an important basis for sales. Their loyalty is very high and usually lasts for a long time. (Fig. 2.33)
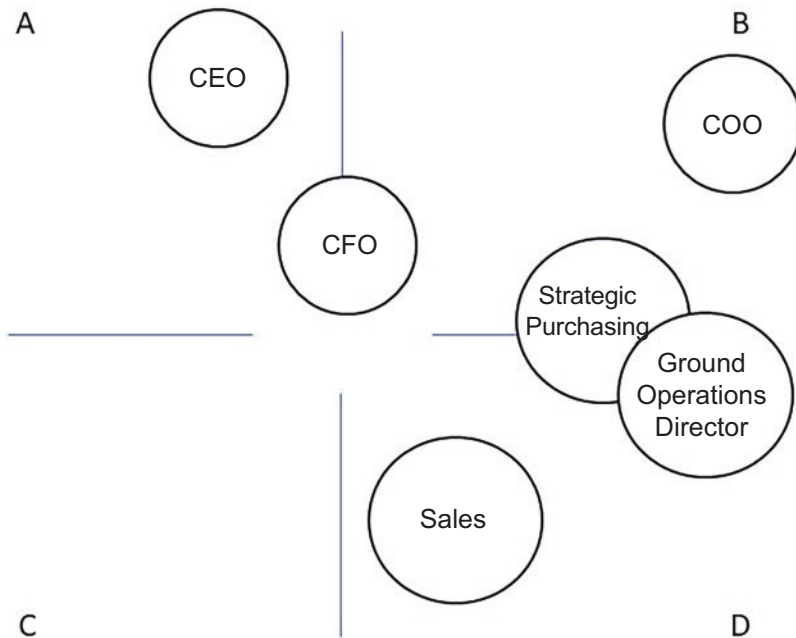
**Fig. 2.31** Power Interest Matrix (Low-cost-Airline). © Hans-Peter Neeb 2022. All Rights Reserved

- Sympathizers are customers who are satisfied and bound. Due to the size of their segment and their loyalty, they form an important basis and ensure profit and growth.
- Mercenaries are satisfied, but emotionally unattached customers. They are important, but rather price-driven and latently disloyal. To turn a mercenary into a sympathizer, an emotional bond must be achieved.
- Prisoners are dissatisfied (disappointed), but emotionally bound. Often they were formerly satisfied. To turn a prisoner into a sympathizer, his satisfaction (again) must be increased.
- Adversaries are prisoners who are particularly dissatisfied, but emotionally bound.
- Opponents are customers who are dissatisfied and emotionally unattached. Their loyalty is usually rather low and the risk of churn is present. One must find ways to either satisfy them and make them mercenaries or bind them and make them prisoners. The best thing is if both succeed and they become sympathizers, even if that is not easy.
- Enemies are very dissatisfied and unattached. They are disloyal and can cause considerable damage. It is important to recognize the enemies, but extremely difficult to make them satisfied.
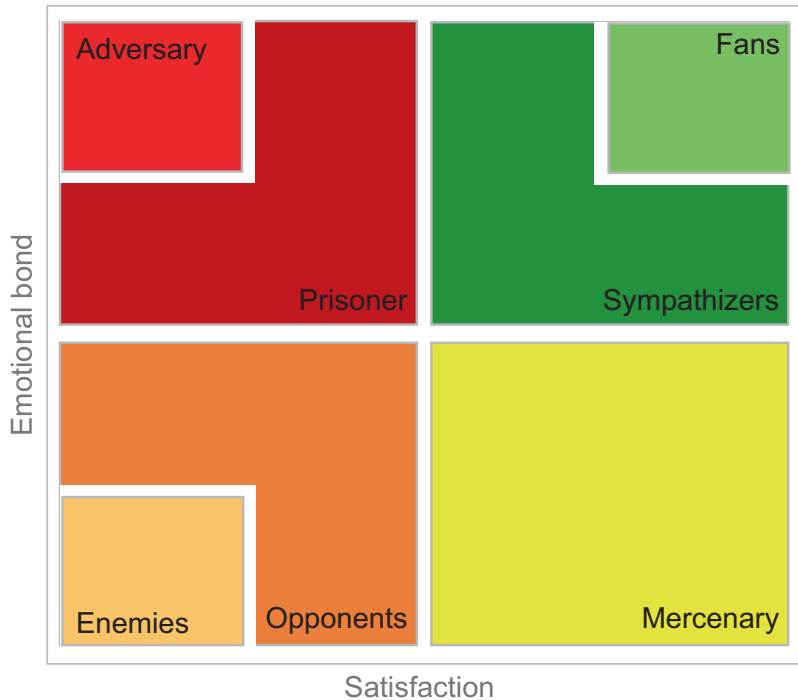
**Fig. 2.32** Fan principle. Based on Becker und Daschmann 2016, p. 74; with kind permission of © Springer Fachmedien Wiesbaden GmbH 2016. All Rights Reserved

Note: These assessments refer to the people on the customer side. A similar evaluation can also be done at the company level of the customer (Fig. 2.34). We have two perspectives. Binding plays a role here, not emotional binding anymore, because companies as legal forms have no emotion. Thus, there are no real fans anymore. The binding of companies often comes about through technical and/or contractual agreements. Contracts can bind them in the short or medium term. Technologies can bind them in the medium or long term. The switching effort is then rather high. Especially with technological binding, the switching effort can be extreme, then the prisoners or adversaries can become dangerous. They are not satisfied with their fate and sometimes agitate against the provider, which can develop into a serious threat. Thus, it is essential to recognize the adversaries, which is not easy, however, because out of fear, tactics or calculation they often do not reveal themselves. Either one convinces them, binds them by other means or isolates them. In the context of contracts and technology, binding can be positive, because it offers special advantages and the decision was made for this reason at the time. Thus, contracts and technologies can lead to emotional binding of people. We will focus on the people on the customer side and not on the company in the following case studies.
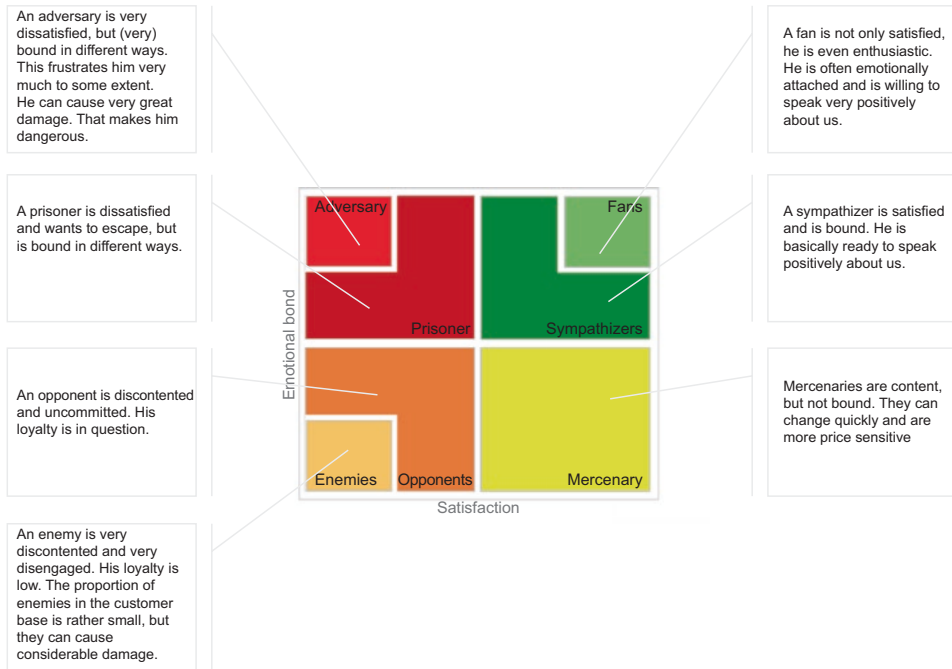
An adversary is very dissatisfied, but (very) bound in different ways. This frustrates him very much to some extent. He can cause very great damage. That makes him dangerous.

A fan is not only satisfied, he is even enthusiastic. He is often emotionally attached and is willing to speak very positively about us.

A prisoner is dissatisfied and wants to escape, but is bound in different ways.

A sympathizer is satisfied and is bound. He is basically ready to speak positively about us.

An opponent is discontented and uncommitted. His loyalty is in question.

Mercenaries are content, but not bound. They can change quickly and are more price sensitive

An enemy is very discontented and very disengaged. His loyalty is low. The proportion of enemies in the customer base is rather small, but they can cause considerable damage.

Emotional bond

Adversary    Fans

Prisoner    Sympathizers

Enemies    Opponents    Mercenary

Satisfaction

**Fig. 2.33** Fan Principle: Explanations of the quadrants. Based on Becker und Daschmann 2016, p. 74; with kind permission of © Springer Fachmedien Wiesbaden GmbH 2016. All Rights Reserved

If a company has real fans, it can consider itself lucky. Because the appreciation that is shown to one by fans is overwhelming and also pays off economically. Fans ensure a high motivation among the employees, which leads to significantly better performance and in turn helps the customers. One can almost speak of a perpetual motion machine—a self-reinforcing, mutual relationship. For these "favorite customers" employees are also happy to go the extra mile.

An essential question is still how to find out satisfaction and loyalty. Satisfaction can first be asked directly. It is also interesting to ask other people whether someone has expressed satisfaction or whether he makes contrary statements behind the scenes. It is also worthwhile to find out the reasons for the satisfaction, because with that you can immediately check whether the statement was made purely out of courtesy or whether there were actually clear arguments for it.

It becomes more difficult with the topic of loyalty. Emotional loyalty can be heard when, despite not being 100% satisfied, it means something like: "Well, you still have to improve that." Or: "Ok, that was not ideal, but you are doing a great job otherwise." Here you can hear a tendency to potential forgiveness or basic tolerance. The person is therefore somehow (somewhat) bound. A slip-up is forgiven because the customer generally
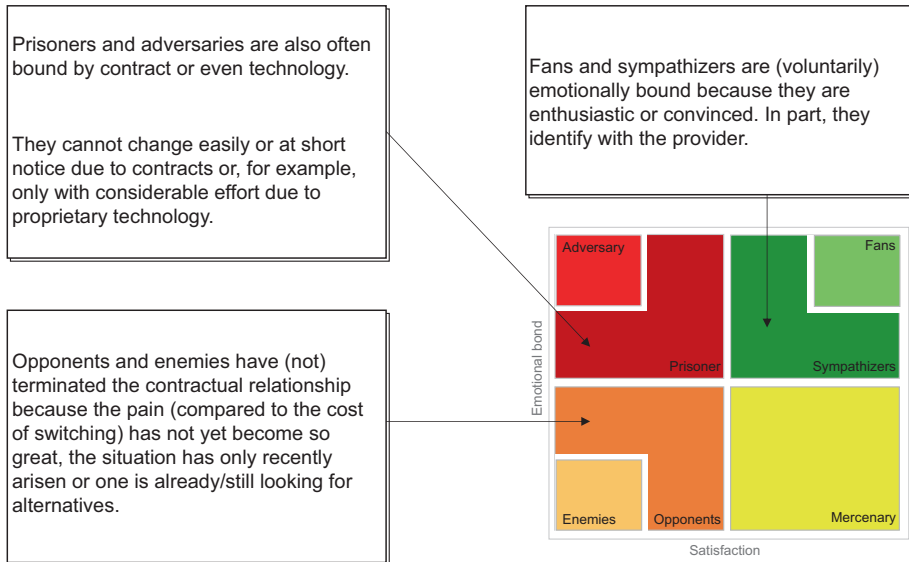
**Fig. 2.34** Fan Principle: Types of binding of companies. Based on Becker und Daschmann 2016, p. 74; with kind permission of © Springer Fachmedien Wiesbaden GmbH 2016. All Rights Reserved

has a good feeling with the provider. However, one should not overstretch this advance of trust. For example, if someone is willing to help with a question or a favor, that can be another indicator of loyalty. You can also simply ask: "What speaks for us?" If then rather emotional arguments such as reliability, trust, understanding, attention, empathy, openness, availability, flexibility, staying true to the principles, good cooperation and so on are mentioned, this pays off on the one hand on the satisfaction, but it can also be important signals for emotional loyalty. It is therefore not so much about hard performance parameters, but about soft factors that describe the context of the customer relationship in which the service delivery takes place.

Another interesting aspect is that one can and should apply the fan principle to oneself as a provider (the company) and also to oneself as a salesperson or key accounter (the person). There can therefore be two points of reference. From practice we know that the ratings of customers from this perspective often diverge. Often the personality of the salesperson and the developed relationship play such an important role that the fan assessment for the salesperson is more positive than the assessment of his employer. It is said so nicely "It's a people business." (Meaning: The person counts.) The provider himself can have a pretty comparable (or even slightly weaker) offer compared to the competition. If the person and the qualities of the salesperson are so clearly appreciated by the customer, the customer still stays with this provider. This can be an important factor of loyalty. "People do business with people they like" (Meaning: People like to do

business with likeable people.) Thus, the customer can, for example, be a sympathizer or fan of the salesperson, but with a view to his employer a mercenary or maybe a prisoner. With regard to persons, an emotional bond is usually meant. Of course, there is also the opposite case, which is much rarer and often does not last long in time, because it is not accepted by the customer. The performance of the provider must be exceptionally good compared to the competition if a customer accepts a worse relationship or weaker bond to a salesperson.

**CASE STUDY Customer Liquefied Gas Manufacturer**

The interesting and difficult thing about the constellation is that the Director Global Diversity favors us and is our fan, but the Chief HR Officer tends to vote for the competition (Fig. 2.35). It is helpful that the CEO is very satisfied with us and also has an emotional bond with us. Very difficult is the CFO, who has no emotional bond and is also dissatisfied. The purchasing department has rather a medium bond and is rather dissatisfied. Here it should be aimed to better understand the reasons for the low bond and the dissatisfaction.
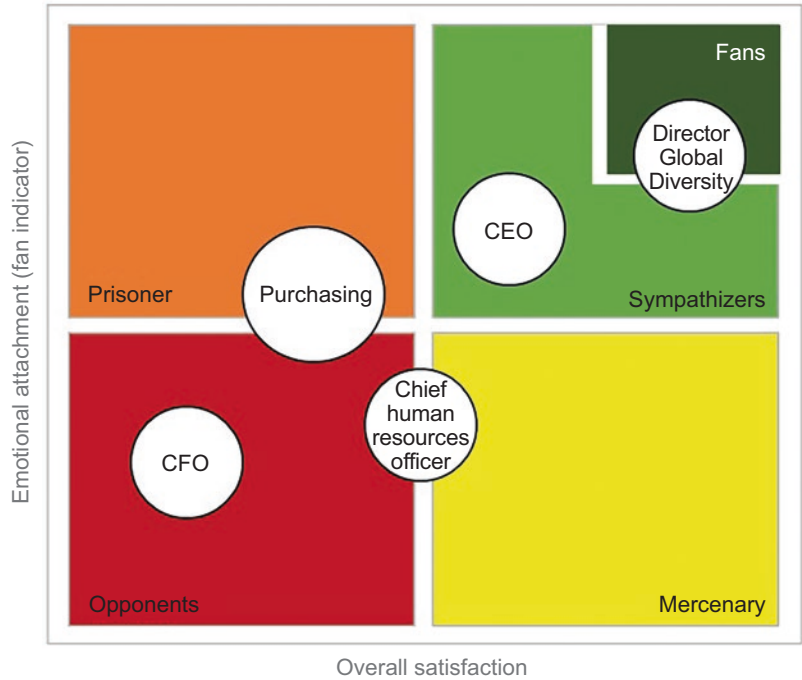


**Fig. 2.35** Fan principle—customer: liquefied gas manufacturer. Based on Becker und Daschmann 2016, p. 74; with kind permission of © Springer Fachmedien Wiesbaden GmbH 2016. All Rights Reserved

The discrepancy between the Director Global Diversity and Chief HR Officer needs to be analyzed more closely. With which levers can a stronger favoritism of the Chief HR Officer be achieved? It is important to keep the CEO as a sympathizer, to understand exactly why he favors us and to strengthen his bond even more. It is necessary to consider whether one can perhaps convince the CFO and/or the purchasing department even more by suitable contract constellations. One can also examine to what extent a positive influence of the less inclined decision-makers with the support of the sympathizers and especially the fans is possible or sensible. ◄

---

**CASE STUDY Customer Investment Bank**

The CIO is a fan (Fig. 2.36) of us and wants to push us through. The CFO and the strategy chief see it more soberly. They are satisfied with us, but less emotionally attached. Our competitors are as capable as we are. The Chief Investment Officer is a sympathizer of us, while the *Global Operations Director* is rather neutral and indifferent. The CEO also appreciates our capability, although his emotional attachment is
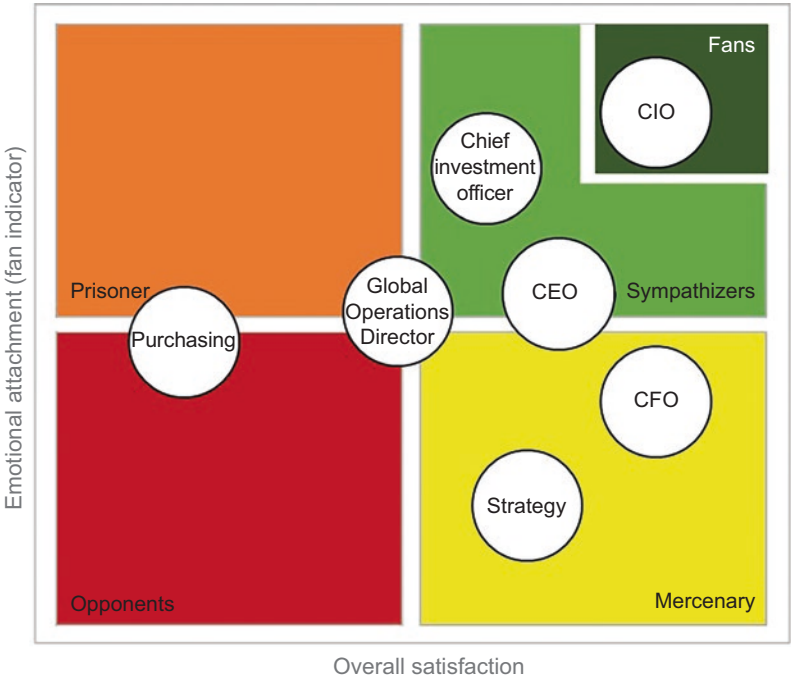


**Fig. 2.36** Fan principle (customer: investment bank). Based on Becker und Daschmann 2016, p. 74; with kind permission of © Springer Fachmedien Wiesbaden GmbH 2016. All Rights Reserved

rather neutral to positive. The purchasing department is dissatisfied and takes a neutral stance on the bond.

Our supporters CIO, CEO and Chief Investment Officer need to be supplied with information and kept on our side. For the Global Operations Director, it is important to find out if he favors competitors and why. Maybe there are levers that make him positive. The attitude of the CFO and the strategy chief are to be questioned, to understand where the lack of emotional attachment results from. Especially for the CFO, it would be important to find out if there are options that make him favor us more. For the purchasing department, it is also necessary to analyze why the opposing attitude exists. ◄

**CASE STUDY Customer Food Retailer**

An opponent of the topic or provider is the CFO (Fig. 2.37). He would rather dedicate the budgets to other strategic investments. In addition, the costs seem too high to him. His bond is very high, however, not voluntarily, as it is based on contractual agreements. This constellation already poses a challenge. The CEO is quite satisfied, but his bond is limited, as the topic of cooling system is too operational for him to engage
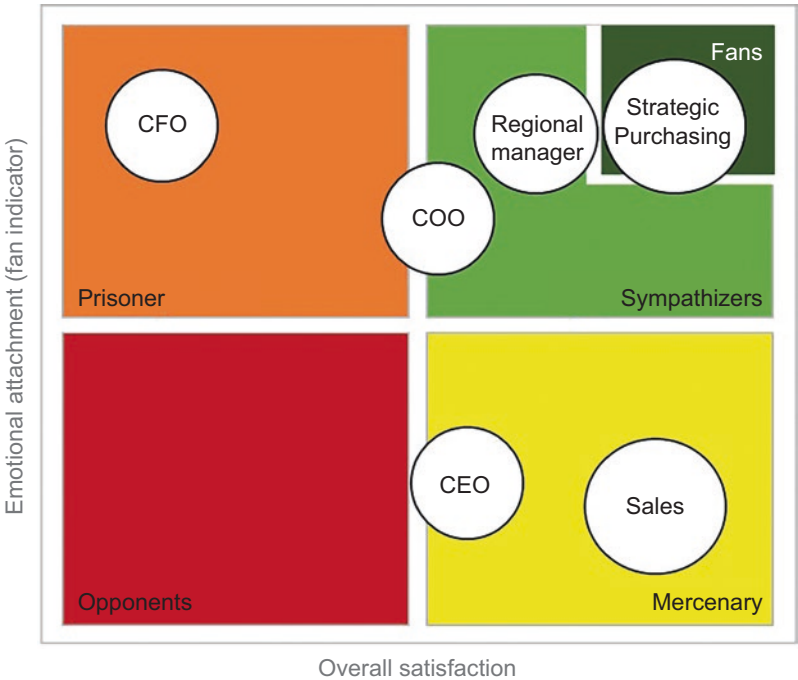


**Fig. 2.37** Fan principle (customer: food retailer). Based on Becker und Daschmann 2016, p. 74; with kind permission of © Springer Fachmedien Wiesbaden GmbH 2016. All Rights Reserved

more intensively for a provider. He can also live with competitors. For him, the topic is more interesting than the respective provider. Thus, he can hardly be expected to actively support us. The sales department is satisfied, because they can position themselves very sustainably towards their own customers, but the bond of the purchasing department for this topic is rather limited. The highest satisfaction and the highest bond has the strategic purchaser. He is even a fan. Due to the comprehensive contract, which regulates exchange and maintenance geographically nationwide, he sees many advantages for the project. Similarly, it is for the regional manager, who is responsible for an important region. He can also address and convince the customers much better with the sustainability topic. The COO is also satisfied with the initiative, and his bond is also recognizable.

The question arises whether the attitude of the CFO can be influenced positively in any way. The CEO and the seller seem to be supporters, but their bond to the provider is low. The three key persons are thus the COO, the regional manager and the strategic buyer. It depends on them whether they can assert their interests against the CFO. These persons need to be provided with the right information and the relationship with them must be maintained, to build and maintain trust in the provider. ◄

---

**CASE STUDY Customer Low-cost-Airline**

The COO is very satisfied with us (Fig. 2.38) and has a strong emotional bond. He favors us over the competition and is even our fan. From his point of view, we solve his operational problems best. This applies in a comparable way to the Ground Operations Director. The CEO is also satisfied, but he has no bond with us. He may be indifferent to the various providers. This needs to be found out. The CFO is more or less satisfied, but emotionally bound. This is an opportunity for us, because he is basically well-disposed towards us. Now it is important to understand what he is not satisfied with and how we can score with him, so that a right shift can take place. The CFO is important, because he has great power. So we have to take care of him. A problem can be the strategic purchasing, because he is rather dissatisfied and has no pronounced bond with us. It will be difficult if he is more positive towards our competitor. If he has more or less the same attitude towards all providers, this is not very conducive, but does not have to be an obstacle. Here it is important to understand the context of this classification. The sales department is also not very helpful in this example. He is relatively satisfied, but there is hardly any bond, so the loyalty will not be very strong. ◄

## 2.7.3  Role Analysis

The stakeholders on the customer side also have different roles according to their tasks. Here, both persons within and outside the customer organization are relevant. For exam-
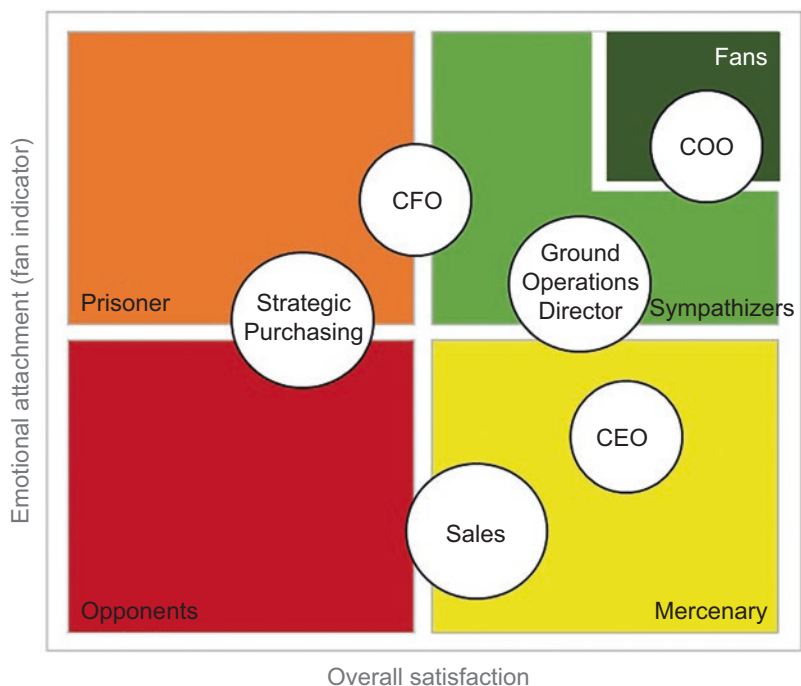
**Fig. 2.38** Fan Principle (Customer: Low-cost-Airline). Based on Becker und Daschmann 2016, p. 74; with kind permission of © Springer Fachmedien Wiesbaden GmbH 2016. All Rights Reserved

ple, roles are distinguished such as coach, decision maker, recommender or influencer. In Table 2.2 it is shown who acts technically or commercially or who is in purchasing. Also, the positive/negative inclination of the relationship and the degree of influence are recorded. These evaluations should be made as far as possible in the team, as each sales-person may have a different perspective on the persons. Especially the reasoning for the respective perspective can lead to new insights and to a common, consistent picture.

A champion is, for example, someone who can influence decisions. He usually has a personal or professional advantage and thus an interest in the decision. The champion is often found internally. The decision maker has formally the final decision. This is always an internal role. The recommender gives his assessment of a solution or formulates requirements and conditions. This can be an internal or an external person. The influencer can influence the decision according to his own agenda. This can also be an internal or external role.

The stakeholders have different tasks and are active in various areas. Thus, they look at the decisions with different perspectives. It can be a technical view or an IT view, it can be a commercial role or a procurement position in purchasing. In addition, an assessment is important, whether the relationship is rather good or bad and how strong the

**Table 2.2** Role matrix

| Current contact person | Role | Type | Relationship | Influence | Roll | |
|---|---|---|---|---|---|---|
| … | … | … | … | … | 4 | Champion/ Sponsor |
| … | … | … | … | … | 3 | Decision maker |
| … | … | … | … | … | 2 | Recommender |
| … | … | … | … | … | 1 | User |
| … | … | … | … | … | **Type** | |
| … | … | … | … | … | D | Department |
| … | … | … | … | … | I | IT |
| … | … | … | … | … | C | Commercial Manager, CFO |
| … | … | … | … | … | P | Purchasing |
| **Champion/Sponsor (rarely external)** | | | | | **Relationship** | |
| 1. Has the influence to help us. | | | | | 2 | Supporter |
| 2. Has personal or professional advantage through us. | | | | | 1 | Good |
| **Decision maker (internal)** | | | | | 0 | Neutral or unknown |
| Has the final, formal decision regarding contracts and decisions. | | | | | -1 | Bad |
| (This is a role, not an individual). | | | | | -2 | Opponent |
| **Recommenders (internal/external)** | | | | | **Degree of influence** | |
| Recommends a solution, agrees on terms, a group or list of potential partners. | | | | | 3 | High |
| Does not recommend a specific partner/vendor. | | | | | 2 | Medium |
| **User (internal)** | | | | | 1 | Low |
| Benefits of the acquisition or investment. (Production employees, PC users, ...) | | | | | - | - |

degree of influence is. These assessments can change from year to year. Especially promotions or changes between organizational areas at the customer lead to changes in the role matrix.

We evaluate different criteria to examine and better grasp the group of people.

- **Role:** The people can take on various roles, such as champion/sponsor, decision maker, recommender, influencer or others. The champion or sponsor has the final responsibility. Sometimes he (or she) is also the ultimate decision maker, but often (at first) stays in the background. Usually he has a senior management role or even a CXO role. He can also be the one who initiated the topic or convinced the decision maker that this initiative is necessary. The decision maker is the one who makes the professional decision in the tender, in the investment/procurement or in the project. He often acts as the central person in the project. As described, sometimes, when it

comes to strategic issues, there may also be a sponsor (in the background) to whom the decision maker reports. In rare cases, there are also two decision makers. This can make sense if a project affects two departments. Furthermore, recommenders/coaches play a role. They can be internal or (often) external. They can be experts or consultants who provide specific professional advice on a procurement and are often consulted because they already have personal, practical experience with the topic. In addition, it is always advisable to involve the users or beneficiaries of the decisions that affect them in the process. On the one hand, they have the practical experience in the daily application and on the other hand, they have to live with the decision in the future and achieve the best possible results with it.

- **Type:** Another important consideration is the question of from which perspective the person views the topic. We have, on the one hand, the department or departments from which, for example, the decision makers and users come. Since many topics nowadays have an IT reference or software is procured, the IT department must be involved. For pure IT decisions, the department and IT area are identical. Every decision requires an investment. Therefore, the finance department or its head/CFO must be involved. In addition, the procurement is carried out by the purchasing department, which of course must also be involved beforehand.

- **Relationship:** We also evaluate the personal relationship. This is less about the content-related question, which plays an essential role in the fan principle, but rather about the quality of the personal relationship. Since it can be a team on the provider side, one has to decide whether the average relationship of the person on the customer side to the team is taken into account, the relationship to the person in the provider team who has the best relationship is considered, or the relationship to the person in the provider team is analyzed who should/must have the main contact. This decision must be made uniformly for all customers in principle. If professional competence is important here and varies, one has to choose the last variant. If there is more freedom of choice, one can choose the second variant, because one can adapt the persons on the provider side who should maintain the relationships.

- **Degree of influence:** The degree of influence correlates with the aspect *Power* in the power-interest matrix.

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**CASE STUDY Customer Food Retailer**

Among the four influential people, it is noticeable that we have the best relationship with the strategic purchasing and the worst with the CFO (Table 2.3). The latter can be or become a problem, because he has the commercial role. We have a neutral relationship with the CEO and the COO. The COO has the technical role. The strategic purchasing has medium and the sales has low influence. Our relationship with both is good.

It is necessary to check whether it is useful and possible to establish a relationship with the CEO. It is important to analyze and understand the relationship with the

**Table 2.3**   Role matrix (Customer: Food manufacturer)

| Current contact person | Role | Type | Relationship | Influence | Roll | |
|---|---|---|---|---|---|---|
| CEO | Dec Mkr | D | 0 | 3 | 4 | Champion/Sponsor |
| CFO | Rec | C | -2 | 3 | 3 | Decision-maker |
| Strategic Purchasing | Rec | P | 2 | 2 | 2 | Recommender |
| Regional manager | Rec | D | 1 | 3 | 1 | User |
| COO | Rec | T | 1 | 3 | **Type** | |
| Sales | Rec | D | 0 | 1 | D | Department |
| … | … | … | … | … | IT | IT/Technology |
| … | … | … | … | … | C | Commercial Manager, CFO |
| … | … | … | … | … | P | Purchasing |
| **Champion/Sponsor (rarely external)** | | | | | **Relationship** | |
| 1. Has the influence to help us. | | | | | 2 | Supporter |
| 2. Has personal or professional advantage through us. | | | | | 1 | Good |
| **Decision maker (internal)** | | | | | 0 | Neutral or unknown |
| Has the final, formal decision regarding contracts and decisions. | | | | | -1 | Bad |
| (This is a role, not an individual). | | | | | -2 | Opponents |
| **Recommender (internal/external)** | | | | | **Degree of influence** | |
| Recommends a solution, agrees on terms, a group or list of potential partners. | | | | | 3 | High |
| Does not recommend a specific partner/vendor. | | | | | 2 | Medium |
| **User (internal)** | | | | | 1 | Low |
| Benefits of the acquisition or investment. (Production employees, PC users, …) | | | | | - | - |

CFO. What indicates a negative relationship? What indicators do we perceive? Are there causes that we can compensate or eliminate? What levers do we have to at least raise the relationship to a neutral level? ◄

**CASE STUDY Customer Low-cost-Airline**

There is a very good relationship with the operations managers, such as the COO and the Ground Operations Director (Table 2.4). Their power is high to medium. There is only a limited good relationship with the CEO as the decisive person. There is a neutral relationship with the CEO and a good relationship with the CFO. The relationships with the strategic purchasing and the sales department are rather poor. However, they also have only medium or low influence. This may not be so harmful.

**Table 2.4**   Role-Matrix (Customer: Low-cost-Airline)

| Current contact person | Roll | Type | Relationship | Influence | | Roll |
|---|---|---|---|---|---|---|
| CEO | Champ | D | 0 | 3 | 4 | Champion/Sponsor |
| CFO | Dec Mkr | D | 1 | 2 | 3 | Decision-maker |
| COO | Dec Mkr | D | 2 | 3 | 2 | Recommender |
| Ground Operations Director | Dec Mkr | P | 2 | 2 | 1 | User |
| Strategic Purchasing | Dec Mkr | P | -1 | 2 | | **Type** |
| Sales | Dec Mkr | C | -1 | 1 | D | Department |
| … | … | … | … | … | IT | IT/Technology |
| … | … | … | … | … | C | Commercial Manager, CFO |
| … | … | … | … | … | P | Purchasing |
| **Champion/Sponsor (rarely external)** | | | | | | **Relationship** |
| 1. Has the influence to help us. | | | | | 2 | Supporter |
| 2. Has personal or professional advantage through us. | | | | | 1 | Good |
| **Decision maker (internal)** | | | | | 0 | Neutral or unknown |
| Has the final, formal decision regarding contracts and decisions. | | | | | -1 | Bad |
| (This is a role, not an individual). | | | | | -2 | Opponents |
| **Recommender (internal/external)** | | | | | | **Degree of influence** |
| Recommends a solution, agrees on terms, a group or list of potential partners. | | | | | 3 | High |
| Does not recommend a specific partner/vendor. | | | | | 2 | Medium |
| **User (internal)** | | | | | 1 | Low |
| Uses the connection or the investment. (Production employees, PC users, …) | | | | | - | - |

However, a problem is the relationships with the CEO and CFO. It must be analyzed and understood what the cause is and whether levers can be identified to improve the relationship. The CEO will certainly be interested in how the competitive positioning of the airline can be improved, the prices lowered and new passengers won. These benefit aspects must be presented. The CFO wants to see how the ongoing costs of the airline can be reduced and the downtime of the aircraft can be minimized. ◄

### 2.7.4   Four-Color Model

In sales, we deal with people and thus with individual personalities. There are different models to explain personalities. We look at the 4-color model as an example, because it is easy to handle and the personalities are usually well assigned. The 4-color model, also called DiSC®-model (Simon, 2006), is based on the archetypes of Carl G. Jung
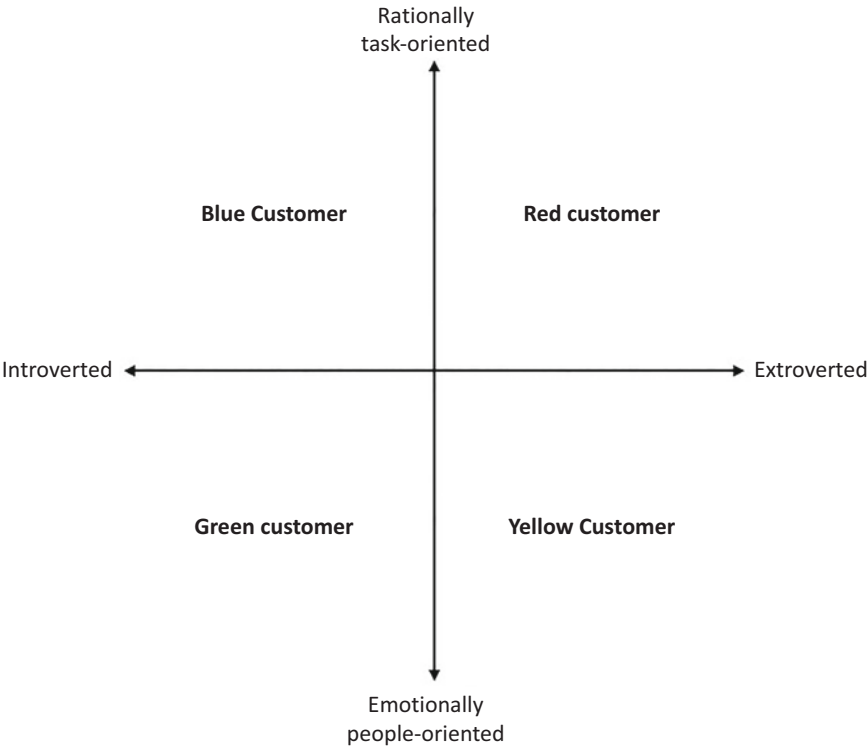
**Fig. 2.39**   The four personalities. © Hans-Peter Neeb 2022. All Rights Reserved

and the typology of William M. Marston (Wikipedia, n.d.a) and distinguishes four basic types (Fig. 2.39). It considers the two dimensions of introverted and extroverted as well as rational task-oriented and emotional people-oriented. Thus, there is the extroverted doer (red), the introverted analyst (blue), the extroverted relationship person (yellow) and the introverted feeling person (green) as well as of course a whole range of mixed types from these four basic types. Many people have shares of several personalities in them, but often one personality dominates, and this one interests us primarily.

Fire-red customers are energetic and extroverted, they are action-oriented and always on the move. They approach others in a direct, authoritative way and radiate a desire for power and control. They can decide quickly. The sun-yellow customer is a person who is strongly extroverted, radiant and friendly. He is usually positive and strives for good human relationships. He approaches others in a persuasive, democratic way and radiates the desire for sociability. People with an earth-green personality focus on values and depth in relationships. They want others to rely on them. They prefer democratic relationships that value the individual and have a personal style, which radiates the desire for understanding. The cold-blue personality shows itself introverted and has the desire

to know and understand the world around him. He prefers written communication to get clarity and precision, and radiates a desire for analysis. The red personality wants to act now. The yellow customer wants to do things together. The green personality is out to shape aspects in a caring way. The blue person values doing it right. These are the central traits.

The red personality is the "go getter", who likes to make and implement decisions quickly. A personality example could be Uli Hoeneß. The yellow personality is the "promoter", who likes to do things with others and expresses his sociability. An example could be Barbara Schöneberger. The green person is the "nurturer", who values values, reliability and understanding. He pays attention to making and implementing decisions in a caring way. An example is Günther Jauch. The blue person is the "examiner", who likes to really understand things. Wolfgang Schäuble could be an example.

The personalities blue and yellow as well as red and green have a hard time getting along with each other, if they do not recognize and respect each other as different personality types. They are often described as opposite types, but they can have a good relationship, even if they have to focus on it and it is exhausting for both. Sometimes that does not work either. That does not have to mean in sales that the offer does not fit, it can also be due to the different personality types. It is helpful to recognize this difference. Maybe a different contact person constellation is possible. The same types or types that are similar can often get along more easily.

The crucial point is to adapt your own communication to the personality of the customer. Only in this way you can understand and reach your counterpart. A red personality wants to get to the point and can decide much earlier than for example a blue type, because he needs time and facts. The green customer is more focused on values and appreciation, before he gets to content aspects. For the yellow personality, relationship and sociability are in the foreground, and only then possibly the interest in facts. So go through the right door! I have to communicate with a red person first through the red door. That is his primary attitude. Possibly, other traits, i.e. colors, play a role afterwards. But the first access has to be through the door in the right color.

This color theory is also helpful for the team composition of sales teams, by representing different personalities in the team, in order to cover the different personalities on the customer side as well. The color model can also be applied to entire companies. You can characterize corporate cultures. Some classic banks, for example, are more blue-oriented and certain start-ups tend to be more yellow cultures.

▶   Note
    Understand the people and their roles and communicate individually and correctly
    with the respective type.

Decisions are made by people. Only if we really understand who they are, what role they play and what benefit they will have from our own offer, can we communicate successfully and individually with them.

## 2.8    Top Executive Relationship Program (TERP)

An analysis without actions is useless. It is not enough to know who you are dealing with. It also requires clear actions and a coordinated program of actions to draw value from the analysis. How do we develop the relationships with the individual people, by whom and for what purpose? The stakeholder analysis has shown us why we need to build or further develop a relationship with whom. Now we define with TERP (Sieck, 2019) the how.

After we have understood who the contacts on the customer side are and what attitude they have, the next step is to develop a strategy. Who from our own team takes care of the individual people is determined within the framework of a contact mapping, also called *relationship matrix* (Table 2.5). Especially for larger, significant customers with several contacts, it is important to think about a sophisticated relationship strategy. For large, important projects, it makes sense to involve more people from our own side than just the salesperson and the sales manager. However, this personnel and organizational effort is only made for selected customers. In this relationship structure to the most important stakeholder on the customer side, our own management or board level should also play a role. Perception and support from the top level is important and appreciated by the customer. Here, long-term orientation is more important than activism. The mere fact that the customer has a contact person at the highest level already represents a value in itself.

A coordinated relationship matrix as in Table 2.6 defines who should take care of whom (***), who can take care of whom (*) and who should rather not communicate with whom (–), in order to maintain consistency. The main or primary contact (***) bears the responsibility for the relationship with this person. The customer's people are listed in the first column and the own team's people in the first row.

**Table 2.5**   TERP relationship matrix

| Customer\Provider | Managing Director | Head of Finance | Sales Manager | Sales | … |
|---|---|---|---|---|---|
| **CEO** | … | … | … | … | … |
| **CFO** | … | … | … | … | … |
| **COO** | … | … | … | … | … |
| **Regional Manager** | … | … | … | … | … |
| **Strategic Purchasing** | … | … | … | … | … |
| **Sales** | … | … | … | … | … |
| **…** | … | … | … | … | … |

**Table 2.6**   TERP relationship matrix (customer: food retailer)

| Customer\Provider | Managing Director | Head of Finance | Sales Manager | Sales | … |
|---|---|---|---|---|---|
| **CEO** | *** | * | – | – | … |
| **CFO** | * | *** | * | – | … |
| **COO** | * | * | *** | – | … |
| **Regional Manager** | * | – | * | *** | … |
| **Strategic Procurement** | * | * | *** | * | … |
| **Sales** | – | – | * | *** | … |
| **…** | … | … | … | … | … |

**CASE STUDY Customer Food Retailer**

The team on the provider side consists of four people as shown in Table 2.6, because it is a significant customer. In addition to the sales manager and the salesperson, the managing director is involved and also brings in his finance manager. He is supposed to cover and manage the relationship with the CFO with his financial expertise and language. The managing director is mainly responsible for the CEO. The sales manager is in charge of the relationship with the COO and the strategic procurement. The salesperson is responsible for the relationship with the regional manager and the sales. In each row, the three stars (***) may only appear once, so that no ambiguities are caused. Only one person has the main responsibility. In a team where the managing director and the finance manager are not actively involved, the tasks have to be taken over by the sales manager and the sales. For many small customers, the salesperson is on his own. Then this matrix is obsolete. ◄

**CASE STUDY Customer Investment Bank**

Since this is a very important IT topic, the own CIO is also involved (Table 2.7) integrated. Especially when it comes to IT specifics, the CIO on the customer side should be excellently supported. The Global Operations Director is primarily looked after by the sales manager. He also takes care of purchasing. The Chief Investment Officer and Strategy are looked after by sales. Since the provider is a larger company, there are the roles of CEO and CFO, who each are responsible for the relationship with their counterparts on the customer side. ◄

**CASE STUDY Customer Liquid Gas Manufacturer**

The main focus is on an important personnel issue with a significant customer, which is why the own personnel manager (Table 2.8) is also consulted. He takes over the relationship with the Chief HR Officer on the customer side. Both speak the same language and know the other world well. The sales manager is responsible for the

**Table 2.7**  TERP relationship matrix (customer: investment bank)

| Customer\Provider | CEO | CFO | CIO | Sales manager | Sales | … |
|---|---|---|---|---|---|---|
| CEO | *** | * | – | – | – | … |
| CFO | * | *** | * | – | – | … |
| CIO | * | * | *** | – | – | … |
| Global Operations Director | * | – | * | *** | * | … |
| Purchasing | * | * | – | *** | * | … |
| Chief Investment Officer | – | – | * | * | *** | … |
| Strategy | – | – | – | * | *** | … |
| … | … | … | … | … | … | … |

**Table 2.8**  TERP relationship matrix (customer: liquid gas manufacturer)

| Customer\Provider | CEO | CFO | Personnel Manager | Sales Manager | Sales | … |
|---|---|---|---|---|---|---|
| CEO | *** | * | – | – | – | … |
| CFO | * | *** | * | – | – | … |
| Chief HR Officer | * | * | *** | – | – | … |
| Director Global Diversity | * | – | * | * | *** | … |
| Purchase | * | * | – | *** | * | … |
| … | … | … | … | … | … | … |

relationships with the purchasing department. The sales department takes over the relationship with the Director Global Diversity. CEO and CFO are mapped again on both sides. ◄

---

**CASE STUDY Customer Low-cost-Airline**

The board takes care of the CEO and the head of finance maintains the relationship with the CFO (Table 2.9). The head of sales is responsible for the relationships with both the COO and the Ground Operations Director. The salesperson focuses on the strategic purchasing and on the sales colleague.

From the assignment according to the relationship matrix, active measures must now be derived to achieve the maximum effect. The activities are defined and updated in the context of a relationship plan. ◄

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The TERP-**relationship plan** (Table 2.10) should cover at least the next three months and can well have a perspective of twelve months. It is recorded who on the customer side is looked after by which internal contact persons. This assignment is not about exclusivity, but rather about ensuring a minimum level of communication and care, so

**Table 2.9** TERP relationship matrix (Customer: Low-cost-Airline)

| Customer\Provider | Board | Head of Finance | Head of Sales | Sales | … |
|---|---|---|---|---|---|
| CEO | *** | * | – | – | … |
| CFO | * | *** | * | – | … |
| COO | * | * | *** | – | … |
| Ground Operations Director | * | – | *** | * | … |
| Strategic Procurement | * | * | * | *** | … |
| Sales | – | – | * | *** | … |
| … | … | … | … | … | … |

**Table 2.10** TERP-relationship plan

| Customer | Internal contact | Reason for the appointment | Key message(s) | Questions | Aspects to avoid | Date | Status |
|---|---|---|---|---|---|---|---|
| CEO | Managing director | … | … | … | … | … | … |
| CFO | Head of finance | … | … | … | … | … | … |
| Division manager | Head of sales | … | … | … | … | … | … |
| Purchase | Sales | … | … | … | … | … | … |
| … | … | … | … | … | … | … | … |
| … | … | … | … | … | … | … | … |

that no information gaps arise. In the individual mapping, both hierarchies and expertise can play a role. The dialogue with the customer is not only to send core messages, but also to place questions. Thus, a managing director (MD) in this context may also get a task to collect structured insights at his level according to the common principle. It is important that the insights are shared internally with each other and flow into a common picture.

The plan is updated for significant customers every three months. The idea is to provide seamless support to the important decision-makers on the customer side, to send relevant messages in the defined period, and to gain the required insights by asking questions.

- **Internal contact:** The person on the provider side who is responsible for the relationship with the person on the customer side is determined. They ensure that the relationship plan is successfully implemented, without having to perform every step themselves.

- **Reason for the appointment:** The occasion or the content for the next appointment(s) is determined. This way, a clear task is assigned in the team.
- **Key message(s):** The value propositions that are to be consistently and coherently placed with the respective person are defined. They must be derived from the strategy alignment and lie in the *Sweet Spot*.
- **Questions:** The essential questions that need to be asked to this person are listed, in order to generate key insights and close gaps. This way, a clear task is defined.
- **Aspects to avoid:** There are always topics that tend to have a negative impact or evoke bad memories for the person. They should be avoided.
- **Date:** The date of the last status is noted.
- **Status:** The current status is noted here.

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**CASE STUDY Customer Liquefied Gas Manufacturer**

- **CEO:** On his agenda is how to make the company the market leader (Table 2.11). We have to see to what extent employee effectiveness through diversity, financial flexibility and growth in the US can contribute to this. These are our three key levers.
- **CFO:** His focus is on reducing costs and the flexibility of personnel costs through temporary workers, in order to be able to react to fluctuations.
- **Chief HR Officer:** He wants to make employee effectiveness a key success factor through a diversity program that leverages all potentials. He needs a partner who has practical experience in how a diversity program works successfully.
- **Global Director Diversity:** His goal is to significantly increase the number of female employees among the executives. He needs a partner who is able to recruit the best female employees in the respective countries.
- **Purchasing:** He wants a global contract that simplifies the conditions for all countries. ◄

▶   Note
   The relationship plan helps to develop the relationships with the right people individually.

The relationships are essential for us to communicate with the decision makers. These relationships must be systematically built and developed. The relationship plan organizes the activities and communication with each person in a simple way, so that the customer receives complete, consistent messages.

**Table 2.11**  TERP relationship plan (customer: liquefied gas manufacturer)

| Customer | Internal contact | Reason for the appointment | Key message(s) | Questions | Aspects to avoid | Date | Status |
|---|---|---|---|---|---|---|---|
| CEO | CEO | Market leader in the industry of liquefied gas manufacturers | The leading liquefied gas manufacturer worldwide through: 1) Financial result, 2) Reputation among customers, 3) High performance organisation. And: Special growth planned in the USA | How big is the success factor of employees on the business model? What does the US expansion look like? | / | 21.01.2021 | Appointment planned. Agenda agreed |
| CFO | CFO | Reduce personnel costs through flexibility | Cut costs: Increase the ratio of temporary project staff from 6 to 8% with a total employee growth of only 3% | What resources and qualifications are needed where? | Temporary staff are more expensive in the long run than permanent employees | 18.01.2021 | Meeting was successful. Plan created |
| Chief HR Officer | Human Resources Manager | Success factor employees | High employee effectiveness by building a best practice diversity program | What should be important in the diversity program? | Evidence of how large the impact of diversity on effectiveness is | 17.01.2021 | Date to be arranged |

(continued)

**Table 2.11**   (continued)

| Customer | Internal contact | Reason for the appoint-ment | Key message(s) | Questions | Aspects to avoid | Date | Status |
|---|---|---|---|---|---|---|---|
| Global Director Diversity | Sales | Achieving diversity | HR Diversity: Increase the propor-tion of women in senior manage-ment to 13% by 2018 | Which positions should more women be brought into? | How easy is it to get female employ-ees for technol-ogy? | 17.01.2021 | Prepar-ing the appoint-ment: Make a list of positions |
| Purchas-ing | Sales Manager | Global Agree-ment | Easy handling through global per-formance contract and focus in the USA | What are the require-ments for a global contract? | Important countries where we are underrep-resented | 15.01.2021 | Phone appoint-ment scheduled |

## 2.9    Marketing/Activities Plan

The question of when and in what order the individual measures should take place remains open. This leads us to the marketing and activities plan. Both tell us when we want to act with whom and how and what we want to achieve. We thus obtain the road-map that is now implemented step by step and continuously adapted.

Based on the above analyses and findings, the communication and activities for the next months can now be derived. The focus should be on the significant customers. It makes sense to update these plans quarterly. The intention is that there is a coordination between the internal people. In addition to the sales colleagues, this may also include contacts in the areas of marketing, corporate communication, event, etc. Here, too, the goal is to have the most important stakeholders on the customer side on the screen and not to overlook anyone. The focus is less on precision and detail than on complete-ness, consistency and substantive meaningfulness. The sales and marketing tasks that are recorded in the *marketing plan* (Table 2.12) include, for example, events, confer-ences, trade fairs, etc. as well as marketing material, such as press releases, brochures or awards, and also ad-hoc communication such as current blog articles, news or mile-stones.

**Table 2.12**  Marketing plan

| Marketing Plan | | | | | |
|---|---|---|---|---|---|
| Events | | | | | |
| Date | Content | Customer contact | Sender | Result | Status |
| … | … | … | … | … | … |
| … | … | … | … | … | … |
| Marketing material | | | | | |
| Date | Content | Customer contact | Sender | Result | Status |
| … | … | … | … | … | … |
| … | … | … | … | … | … |
| Ad hoc communication | | | | | |
| Date | Content | Customer contact | Sender | Result | Status |
| … | … | … | … | … | … |
| … | … | … | … | … | … |

This records both the time at which the activity is to take place. This can be done in months or weeks, which is sufficiently precise. In addition to the content, the customer contact as the recipient and the sender on the provider side are recorded. The desired result is formulated and also the current status. It is not a matter of having a long list. Rather, the purpose is to get a common picture of the customer, which has the advantage that one has important events or topics on the radar and can plan ahead. It is also worth considering for existing customers which content is communicated by sales and which by marketing. It is also necessary to decide which information is communicated by executives and which by the team. Special content should be communicated personally by the executives as a personal message. This applies especially to the significant customers. Other content can be sent as individualized, but automated messages as part of marketing automation. The latter applies especially to the many B and C customers, however B and C are defined.

- **Events:** Events could include classics such as the press ball or mandatory events such as industry conferences or trade fairs (Table 2.13), as they are usually high-caliber. The desired result is to expand an excellent personal relationship or to establish oneself as the important partner in the industry.
- **Marketing material:** While press releases serve to keep target groups informed, quarterly reports, for example, help to establish oneself as an important business partner. The list of people on the customer side is not complete in the example in Table 2.13, but much more extensive in practice. In the example, the highest-ranking contact is shown for better illustration. Especially for particularly important decision-makers, it makes sense to send the information as a personal letter or in the form of

**Table 2.13** Marketing plan example

| Marketing Plan | | | | | |
|---|---|---|---|---|---|
| *Events* | | | | | |
| Date | Content | Customers Contact | Sender | Result | Status |
| Feb 2020 | Press Ball | CEO | Managing Director | Establish/develop an excellent relationship | Save the date |
| April 2020 | Industry conference | Head of business division | Managing Director | To be an important established partner of the industry | Invitation sent |
| May 2020 | Industry fair | COO | Sales director | To be an important established partner of the industry | Invitation sent |
| *Marketing material* | | | | | |
| Date | Content | Customers Contact | Sender | Result | Status |
| Jan 2020 | Press release | Director Business divisions | Sales director | Keep informed | Prepared |
| May 2020 | Quarterly Report | COO + Head of Business Unit | Sales director | Establish as important business relationship | Prepared |
| April 2020 | New brochure | Buying Center | Distribution | Establish as an innovator | Prepared |
| June 2020 | Award | CEO | Managing Director | Provide personal esteem | Tbd |
| *Ad hoc communication* | | | | | |
| Date | Content | Customers Contact | Sender | Result | Status |
| Monthly | Blogs | Buying Center | Sales/ Marketing | Establish as a thematic thought leader | Contact selected |
| Quarterly | Industry News | Buying Center | Sales/ Marketing | Keep informed | Contact selected |
| Tbd | New Lecture | Relevant Executives | Tbd | The expansion of the customer relationship | Tbd |
| Tbd | Milestone | Tbd | Tbd | Being perceived as a key partner | Tbd |

a personal email, while other contacts can be sent using individualized marketing automation. New material, such as brochures, serves to position oneself as an innovator. For this, the target group is already chosen more broadly. The presentation of an award, in turn, is communicated personally at a high level. In addition to appreciating the business relationship, the aim is also to maintain the personal relationship with decision-makers.

- **Regular and ad-hoc communication:** Information that is communicated via blogs or industry news goes to the people involved in the buying centers or project teams. Here, individualized marketing automation tools are usually used. Furthermore, information can be provided about the progressing expansion of the customer relationship. This includes, for example, the conclusion of new or further contracts and special milestones. Both should be done as needed and cannot be planned in advance. A milestone can be the delivery of the 100,000th part of an important component. This is intended to express the duration, importance and speciality of the business relationship. Importance must also be celebrated in order to be perceived as particularly important by the actors on the customer side.

The *activities plan* (Table 2.14) is derived from the TERP relationship plan and specifies dates, contents and desired results. It records both important dates, phone/video conferences, account planning, workshops or reviews. This gives the team, including colleagues outside of sales, an overall picture of the activities with the individual contacts of the customer. A suitable preparation of this plan can also be discussed and/or created together with the customer. This signals a systematic, well-thought-out approach and helps to position oneself as a strategic partner at eye level.

The focus of the activity plan (Table 2.15) is on the agenda setting, the long-term, comprehensive view of the customer and the essential milestones that should be achieved. The main activities with date and topic should be listed. This includes the contact on the customer side and the responsible person on the provider side. Other people will be involved or present, but it is about the responsibility. The preparation and organization is usually delegated. These details are not relevant in the activity plan. It serves more as an overview and a summary of the chronological sequence. In addition, the desired result and the current status are noted and made visible.

The activities in the plan are sorted by time. For the example customer, a meeting with the project team is scheduled for January to jointly initiate the project start. Sales is responsible for the successful planning and execution. The account planning session is being prepared for February. There, the contents for the quarter and half-year should be discussed and the processes agreed with the business unit. The sales manager is in charge. In mid-March, the customer workshop is arranged, in which new initiatives and innovations should be developed with the department. The head of sales is also responsible. The quarterly review with the CFO is planned for early April and the appointment has already been arranged. The focus is on the numbers and the overall satisfaction of the customer. The head of finance of the provider is in charge. The semi-annual executive

**Table 2.14**   Activity plan

| Activity Plan | | | | | |
|------|-------|------------------|-------------|--------|--------|
| Date | Topic | Customer contact | Responsible | Result | Status |
| … | … | … | … | … | … |

**Table 2.15** Activity plan in a practical example

| Activity plan | | | | | |
| --- | --- | --- | --- | --- | --- |
| Date | Topic | Customer contact | Responsible | Result | Status |
| 15.01.2022 | Meeting | Project team | Sales | Project start | Planning completed |
| 10.02.2022 | Account planning session | Head of business unit | Head of sales | Contents and new processes | In preparation |
| 17.03.2022 | Customer workshop | Department | Head of sales | Innovation + initiatives | Agenda + participants |
| 08.04.2022 | Quarterly review | CFO | Head of Finance | Customer satisfaction | Appointment arranged |
| May 2022 | Executive customer briefing | CEO | Managing Director | To expand to key account | In planning |
| … | … | … | … | … | … |

customer briefing with the CEO is scheduled for May. The managing director wants to expand the customer to a key account. Each participant now has the overall view of the customer as well as the overview of the upcoming activities and responsibilities. The core messages that were formulated in the TERP plan also play an important role in these personal appointments and should be placed. The activity plan focuses more on the organizational and temporal aspects as well as the responsibilities. The TERP plan focuses on the content aspects and questions as well as messages.

▶   Note
    Plan, coordinate and align the individual activities with the customer systematically and in advance.

The activity plan is the roadmap for the activities with the customer. It gives all actors a clear instruction on what, when and by whom to do. This ensures high effectiveness with good efficiency.

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# Leading Employees in B2B Sales

# 3

## 3.1 Account Management Processes as Leadership Tools

Leading means, in a figurative sense, to influence the employees of an organization in order to achieve the company's goals. Leaders need a special ability to do this. If one now looks at what all belongs to leadership competencies, one often hears of charisma, personality, living values, inspiration and many other important and correct aspects. The challenge with these characteristics, however, is that they are not easy or hardly learnable. One has them or one does not have them.

Interestingly, there is rarely talk of process competence. From experience, we know that leadership also means competence in the sales process. The benefit of a uniform process is that one has the same approach, the same language, the same perspective, the same analysis method and a consistent, replicable procedure. This means both effectiveness and efficiency. Leading means that one leads the people of a team in one direction or to a goal. This presupposes that a common process is recognizable, comprehensible and implementable for all.

The good news is that one can learn a process. The sales process must bring individual and entrepreneurial benefit in order to be accepted. It must not distract or block, but must focus on the customer. The process helps with this, because it gives orientation, which at the same time requires that the procedure is understandable and brings results, because otherwise it is not accepted. The process must be simple and appropriate, easy to learn and replicable for different customers. People of different types must also be able to work with it.

The process is a helpful tool for the sales manager or sales director, because it simply structures the thinking, acting and deciding. The analysis is done from a uniform point of

view and the quality of the results is predictable, if one implements the process correctly. The system helps to achieve more in less time. Common team meetings are meaningfully structured by giving them a uniform, logical thread. The goal is to achieve better results in fewer and shorter meetings. With a suitable blueprint, this is feasible.

The preparation, execution and follow-up of customer appointments follow a common pattern, so that all participants on the provider and even on the customer side know how the process is. Common customer workshops can be well structured and time-efficiently organized together. Internal and external presentations about the customer are done with the help of a clear template, which allows to focus on the content. Of course, one would not show the customer all his analysis results and share internal information, but one can align oneself with the same grid.

Good process competence also means good customer competence in the end, because one understands the customer correctly through the targeted approach. This does not necessarily require decades of industry experience, although it may not be detrimental, but even helpful. It is important to understand that even young people can quickly achieve sales success with an effective sales method. The process helps them to orient themselves quickly, to focus on the most important insights and to understand the customer correctly. In preparing customer conversations, one collects the right questions, formulates the relevant key messages and comes back with the necessary answers. This represents an essential success factor for salespeople. In practice, it is known that preparation is an important success factor. If the preparation is also particularly structured and along a sensible roadmap, then it is both efficient and effective.

## 3.2    Leading with the Account Plan

The account plan is the document in which the findings of the systematic analysis are captured in a structured way. I recommend writing an account plan for each of the most important ten to 20 customers of a company. This account plan must be updated at least once a year. For significant accounts, this should even be done during the year. For top customers, it may make sense to adjust the account plan quarterly.

A mistake that should not happen is to record the customer's past in the account plan. This only means documentation and frustrates the salesperson. We want to look into the future, analyze our business opportunities with this customer and provide the salesperson and possibly the team with a basis that supports them in their work. The structure is mapped in the analysis in ten steps.

The account plan records the customer's strategy and the strategy for the customer according to the own analysis. It defines the questions or open points, messages that are sent to the various touchpoints at the customer, the own value that the customer buys, and also the stakeholder analysis and findings. Ideally, the account plan is the document

that the managing director or CEO reads before an appointment with this customer and thus receives a comprehensive briefing and a basis for discussion.

It is advisable to discuss the account plan in the team, openly debate and possibly further develop it together. The account plan is a central management tool for the sales manager. The structure of the account plan defines the language in the team, ensures that the necessary insights about the customer are analyzed and that consistent messages are communicated. The salesperson is responsible for the strategy adapted to the customer and for the respective account plan. Excerpts from the account plan can even be shared and coordinated with the customer to ensure that the customer has been understood correctly. This can be done as part of the annual meeting.

It has turned out that DIN A4 high (or horizontal) is a suitable format. The documentation can either be done with a program similar to Microsoft Power Point or a word processing program. The main thing is to capture insights and analysis results as free text in a structured form. For the account selection, a spreadsheet program makes a lot of sense. Of course, the structure of the account plan for a customer can be simplified and only reflect part of the analysis if there are justified reasons for it. The Fig. 3.1 shows an example page of an account plan. The files should be stored on a central drive so that the colleagues in sales have access and can contribute or get inspired. If you are interested in an account plan in PDF format, please feel free to contact me.

The sales manager receives important management tools for his sales team with the AccountJourney® method and the account plan. While the CRM system helps to manage with numbers, the other two management tools help to manage content. A uniform process is described, a common language is defined. The analysis method ensures that the same important insights about the customer are captured, the strategies for the customer are defined, the values are cleanly analyzed, the communication is coordinated and the appointments with the customers are better prepared. The entire sales team receives a structure to control team meetings and customer conversations.

**The Challenger Sale**
There are different types of salespeople. A study analyzed who the most successful salespeople are. The result is described in the publication "Challenger Sale" by Dixon and Adamson (2015). The most successful is the type who takes the customer a significant step further. This is achieved by a deep understanding, by asking the right questions, by acting as a sparring partner at eye level and by providing important insights or advice. The customer thus experiences a value. The salesperson thus becomes an indispensable partner, he can lead his customer and control his activities.

**ACCOUNT-PLAN for xy GmbH**

| 1.2 | **Questions from the waterfall analysis** | Sales/Account Manager: |
|-----|------|------|
| Version: | Date : | Region: |

| | Company level | Business unit/project | Personal level |
|---|---|---|---|
| **Strategy** | | | |
| **Targets** | | | |
| **Challenges** | | | |

**Fig. 3.1** Example page from an account plan. © Hans-Peter Neeb 2022. All Rights Reserved

## 3.3    Sales for Non-Sales

The principle applies: "Whoever has contact with the customer is in sales." What sounds a bit unusual at first has proven to be very effective in practice. In the technical B2B sector, it is often said "The first machine is sold by sales; the next one by the service employee." All colleagues who are, for example, project managers, perform service/maintenance tasks or work on site with the customer, have a sales role. Unfortunately, many are not aware of this. However, these people have a particularly good insight into the customer's company and usually maintain a very good trust relationship with the stakeholders on the customer side. In addition, they are often on site with the customer for a long time or frequently. They have the opportunity to gather strategically decisive insights for the benefit of both partners. But this requires that they are involved in the strategy for the customer, that they are part of the analysis process, that they know which essential insights are important and know the core messages. They are thus part of the virtual sales team and must be included in the sales strategy activities and important sales meetings. They can often provide the required answers, because they have contacts that the actual salesperson does not have or not in the same quality. If these stakeholders, salespeople and sales managers understand the principle and work together according to the Account Journey® method, they can do valuable sales work and influence the development very positively.

Here, sales leads a virtual team, possibly with the help of the sales manager, for significant customers, which includes, for example, colleagues from the service. This also includes regular meetings. For important customers, these meetings should take place at least once a quarter and include a review of the customer using the AccountJourney® method. Everyone should know what information is needed, what questions should be asked, what core messages should be sent, what role the people in the buying center have and what steps are planned in the TERP plan and the activity plan. All members of the virtual team should be able to speak the same language and know the essential terms. Everyone must have access to the account plan.

In the different phases of developing a customer relationship, different roles and tasks can have a changed intensity to the customer (Fig. 3.2). While at the beginning, for example, marketing/presales is more involved, sales or key account management quickly takes on the leading role. At contract conclusion, the project leader or manager takes over the main role, and maybe later service or maintenance comes into play. These are only examples, which can vary from industry to industry and from topic to topic. In addition, the finance area can also play a role, when it comes to invoices or payment modes. Suddenly, maybe a contact to the CFO is established and a relationship is developed. Understanding these dynamics is important to be able to work together in the virtual sales team. Sales or KAM is not involved so dominantly in every phase, because sometimes there is no occasion and the customer, for example, has a different focus and is
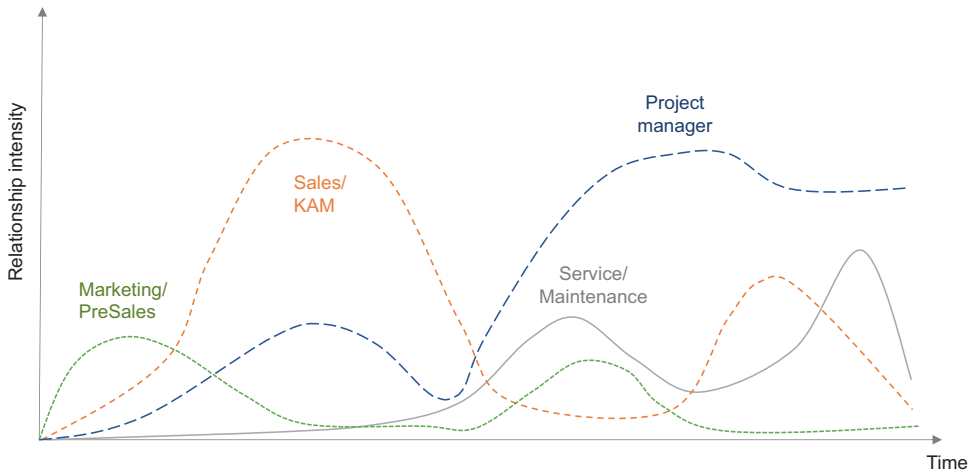
**Fig. 3.2** Cycles of relationship intensity by roles/tasks. © Hans-Peter Neeb 2022. All Rights Reserved

more focused on the project leader because of a project. Thus, everyone on the provider side must know the common goal and strategy, know what insights need to be learned, know the uniform language and common approach and work into the same account plan.

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# Technology in Sales

**4**

## 4.1 CRM

The CRM system is an important tool in sales, to capture essential information about the customers, set reminders for follow-ups and maintain a pipeline. Often we were asked, whether the account plan belongs to the CRM system. This can be done, if it brings benefits. Both constructs are different. The information in the CRM system focuses more on contact information (company, contact person), communication details (last contact, occasion), reminders/follow-ups and pipeline information (expected revenue, probability). The documentation of activities is in the foreground.

The account plan has more of a content focus, is a management tool and looks more into the future. It reflects the findings of the customer analysis, identifies the potentials that exist with a customer, defines the communication, helps with the preparation of appointments and has the goal of being optimally prepared for the customer and their needs.

Some CRM installations offer the possibility to also capture these strategic information, that go beyond pure contact data. Then it makes sense to keep these insights in the CRM system.

## 4.2 Digitalization in Sales (Sales 4.0)

In the last ten to 20 years, the marketing area was completely revolutionized. In sales (B2B), nothing comparable has happened so far. As an exception, one can mention the use of CRM systems. But the real upheaval in sales through digitalization is still ahead of us. Two aspects play a central role. On the one hand, the use of digitally available data

and on the other hand, the use of digital tools. These approaches offer the chance to be better than the competition and to achieve the goal with less effort.

We will thus be able to recognize better and more promising targets, in order to convert them. For this, digital data are especially interesting, that make potentials more visible. Through better information, more transparency is created, which allows a concentration on the more promising leads. The digital tools can facilitate the work of sales, by making information easier to see and display selectively or filtered.

The idea is: "Today we still look for leads; tomorrow we receive purchase/investment signals from the (potential) customers." The customer contacts us, so to speak. Smart data (not only big data) helps us to make the leap into the future. The digitalization and especially freely available B2B data on the internet will redefine the sales task and make new potentials visible. The digitalization will also open up new opportunities for sales. Let us take a closer look at three use case scenarios. (see also: bit.ly/Vertrieb_40)

The right time window is often critical for success in sales (Fig. 4.1). A purchase or better investment need is mainly recognizable by the intention, the timing and the identified decision maker. All these three aspects are freely available in various internet sources for certain investment projects and thus highly interesting for salespeople.

The need to receive digital investment signals has become more and more relevant, because the framework conditions are changing increasingly to the disadvantage of the salesperson. Increasingly fewer decision makers (now 90%) respond to cold calling (Fig. 4.2). The only way to be successful is a qualified referral bridge, which is established by a known contact. About 84% of decision makers respond to that.

The complexity of the decisions increases and thus the size of the buying centers grows. A larger number of members in buying centers has to be managed. The customer becomes more independent and uses available digital information for his own, self-determined decision. Decision makers inform themselves increasingly on their own, before
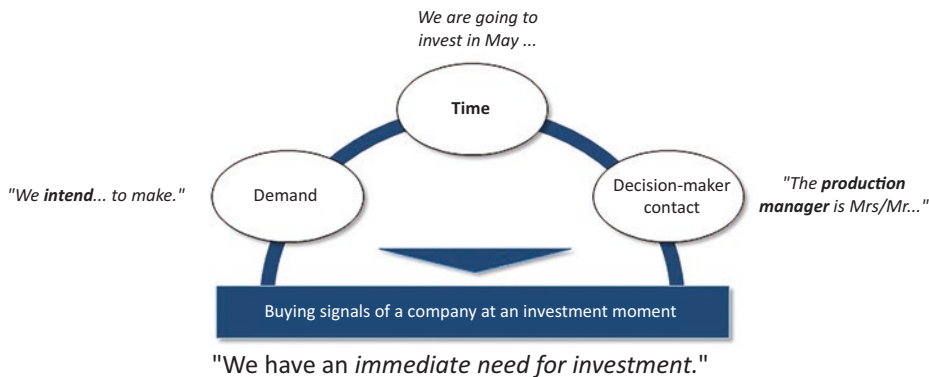


**Fig. 4.1** Digital sales: receiving purchase/investment signals. © Hans-Peter Neeb 2022. All Rights Reserved

| 1. Door openers are in demand | 2. More people in the buying center |
|---|---|
| • 90% of decision makers don't respond to cold calls. (Calisse 2019)<br><br>• However, 84% talk to a salesperson when the contact was made through a colleague/acquaintance. (Minsky 2016) | • Recognizing as well as understanding buying centers and maintaining relationships with them is important.<br><br>• The number of decision makers in buying centers in complex buying scenarios increased from 5.4 in 2015 to 6.8 in 2017. (Toman 2021) |
| 3. Self-informed, independent customers | 4. Digital content is gaining in importance |
| • Today, business decisions begin with extensive online research.<br><br>• CEB estimates that in approximately 57% of cases, the decision-making process is nearly complete before a salesperson is brought in. (Davis 2018) | • In addition, they found that 75% of decision makers and 84% at C-level tend to use social media in the purchasing process. (Schaub 2014) |

**Fig. 4.2**   Relevance of digital sales. © Hans-Peter Neeb 2022. All Rights Reserved

important decisions have to be made. Interestingly, this process already takes place, before salespeople are even involved and can exert their influence. In about 60% of the decisions, this is the case. For the salesperson, it is thus more and more important to get early knowledge of investment projects.

Digital content and content in social media gain more importance. A third of decision makers inform themselves via social media and 75% use this information in the context of decision processes.

For salespeople, it is now important to overcome or avoid these growing hurdles. They can achieve this with the philosophy and tools of digital sales. The Fig. 4.3 shows which four core questions we can answer with freely available digital data and digital tools in B2B sales. The first question is: What do my 1000 next best customers look like? I don't want to get bogged down with 10,000 contacts, but only focus on the next best potential customers. By comparing them with my current existing customers, I can get a top-down list of the next best customers who are most similar to my existing customers and thus have the best chances of acquisition.

The following question can be: "Who was (in the meantime) on my website?" Companies that were on my website have a much higher probability of having a potential need. Usually, only a few companies reveal themselves directly on a website. You can use digital data tools to make these companies transparent.

Furthermore, you can hear in the digital space who has a current investment need. These are freely available digital information that are easy to evaluate and use for sales purposes. If I am a provider of green roofs, it is extremely interesting for me that "out there" a company is planning a new factory hall, a kindergarten, a sports hall or

| 1. Who are the 1000 next best customers? | 2. Who was just on my website? | 3. Who has a need now? | 4. Who am I addressing? |
|---|---|---|---|
| ⬇ | ⬇ | ⬇ | ⬇ |
| Choosing the right audience | Recognize actually interested | Digital buying signals | Recommendation bridges |
| ⬇ | ⬇ | ⬇ | ⬇ |
| Avoid wastage | Address anonymous visitors immediately | Identify opportunities | Use warm contacts |

**Fig. 4.3** Innovations in acquisition & sales in corporate customer business. © Hans-Peter Neeb 2022. All Rights Reserved

something similar. This information is digitally freely available on the internet in different sources and can be accessed by digital tools to use them directly for sales purposes.

The last exciting question is: "How do I get a warm contact to the identified decision maker?" Sometimes network tools like XING or LinkedIn® help. Sometimes you look for further or better referral bridges that are not visible in the mentioned tools. Here too, we use freely available relationship bridges in networks and even visualize them to make it even easier.

All these new insights can make life much easier for a B2B salesperson and make his sales opportunities more successful.

An important note on data protection must be added. The cases and examples are B2B information and not personal data. The B2B data can be automatically scanned, captured and stored without requiring the consent of a person according to the GDPR (General Data Protection Regulation), as no personal data are affected.

### 4.2.1   Look-Alike Models: The Next Best Customer

Who knows which customers are the 100 or 1000 next best customers can do the acquisition with as little scatter effects as possible. The customers of a company usually have something in common (Fig. 4.4), because the offer suits them. This can have different reasons. So-called look-alike models can find similar companies that match the existing customers. The method is not new. However, what is new is that you can use interesting, freely available B2B data from the internet that are meaningful. The companies are compared based on the information on their website. This is insightful, because companies describe themselves and their activities on the website. In this way, similar companies
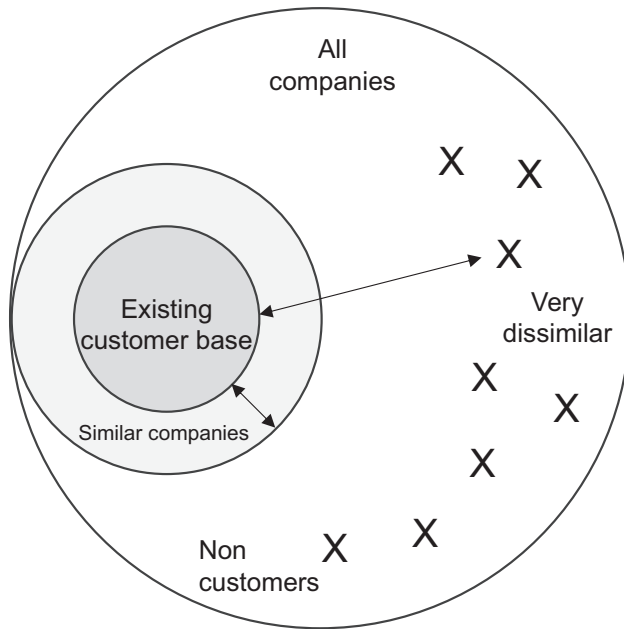
**Fig. 4.4** Similarity principle in the corporate universe. © Hans-Peter Neeb 2022. All Rights Reserved

can be found that can be the next best customers, because they have a higher probability of buying due to the similarity. This is especially true for the acquisition of new customers. For the data-technical comparison, textual content and headings are used, social media content is searched and even technological parameters such as server or operating system versions are compared.

In advance, you can exclude some companies, because they are either not profitable customers, financially not solid or do not offer future potential from an offer perspective. Lack of potential can be justified by the fact that they are tied to the competitor by long-term contracts or because they are subsidiary or parent companies to existing customers and thus already actually present in your own portfolio. By this cleansing, the promising potentials become clear.

As Fig. 4.4 shows, you look at the universe of all companies (all firms) those that you have as existing customers. You compare them with all the others who are not yet customers (non-customers). The algorithm detects similarity patterns. These similarities structure the space into different groups.

There are companies that are very different from the existing customers, and those that are very similar. One should focus on the latter. Now one can choose how far one wants to draw the circle of thought (Fig. 4.5). If one only wants to have the most similar
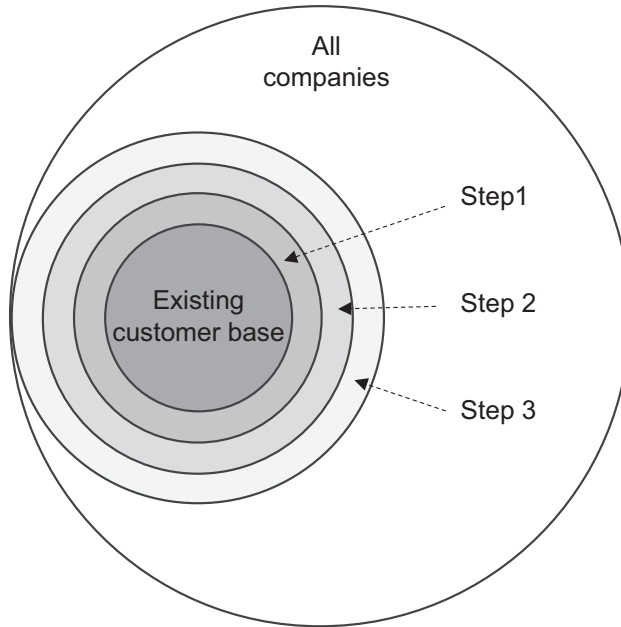
**Fig. 4.5**  Expand your own customer base by step-by-step acquisition. © Hans-Peter Neeb 2022. All Rights Reserved

companies, the circle will be rather small and one will focus on a small amount of potential new customers. If one wants to have as many companies as possible that could be potential new customers, one will also get a lot of companies that have a lower probability of becoming new customers. It is advisable to gradually expand the rings outward. This way, one focuses first on the companies that have a higher probability, and can increase the number step by step. The probability then decreases.

Let us imagine as an example that a company has about 3500 customers, of which it filters out about 500 companies for the reasons described above. Thus, we get about 3000 core customers who make up the current or future success. We take the names and addresses of these customers and transfer them to a list. Using artificial intelligence, we get a new target list of companies (Fig. 4.6). Let us say that we want a list of about 500 new potential customers and that we want to target them with acquisition activities. Even after the start of the acquisition, a learning loop is possible by removing unsuccessful company contacts and focusing more on particularly successful leads in the algorithm.

**Implisense**
Let us look at the provider Implisense as the first tool. It implements the principle described above and helps to find new acquisition approaches by using *Look-alike* analyses.
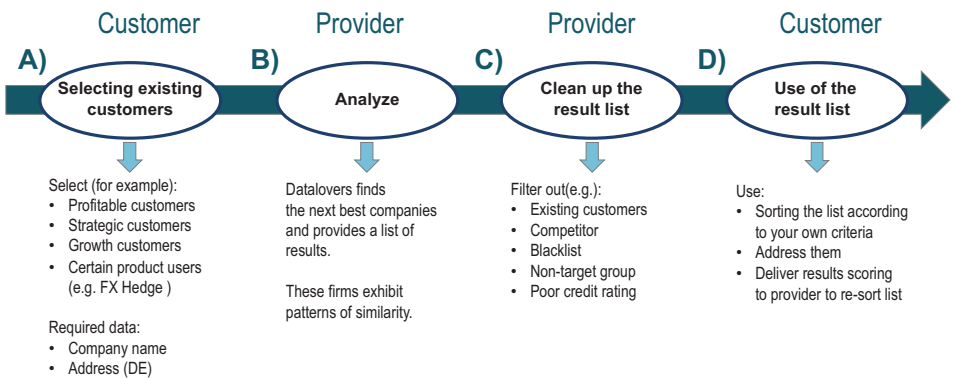
**Fig. 4.6** The process to get the 500 next best customers. © Hans-Peter Neeb 2022. All Rights Reserved

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**Practical Example**

An interesting example is the case of a provider of video conferencing solutions in Fig. 4.7. Using *Look-alike* tools, lists of further potential customers and acquisition contacts were created, successfully processed and new customers were acquired. In the analysis of the data, it turned out that the success was due to the fact that many existing customers and also new customers had at least one subsidiary in China, which is usually noted on the websites. This feature was recognized by the algorithm of artificial intelligence. Logically, video conferencing solutions were used by these companies. For the provider, it was interesting to learn that this factor had such a great importance. The connection was not completely unknown, but not obvious in this extent. Thus, one could also give this aspect a stronger importance in the further acquisition activities.

In Fig. 4.7 one can see in step No. 1 the own list with existing customers. In step 2, the statistical, calculated customer profile with its recognized parameters is displayed. In the third step, it is shown that a significant feature is the characteristic Asian countries. And in the last step, one can see an excerpt from the new target list with the potential new customers. In column B, it is indicated whether these companies have a location in Asia. ◀

---

This Implisense model can now be used to provide potential lead lists that resemble one's own existing customers and thus have a higher probability of success. The insights gained are also important, such as the aspect that the companies have branches in Asian countries. This feature is not immediately apparent when looking at the list of existing customers. The look-alike analysis brings these important insights to light, which makes it possible to align the new customer approach directly to this main motive.

1. Upload of exemplary customers

2. Implisense calculates the statistical customer profile

| | A |
|---|---|
| 1 | Firmenname |
| 2 | "Wikinger Reisen" GmbH |
| 3 | 24-7 Entertainment GmbH |
| 4 | 360 Treasury Systems AG |
| 5 | Abbelen GmbH |
| 6 | Albrecht & Dill Trading GmbH |
| 7 | Altigi GmbH |
| 8 | Antex GmbH |
| 9 | ARI-Armaturen Albert Richter GmbH & Co. KG |
| 10 | ARIMA International GmbH |
| 11 | AUTEC GmbH & Co. KG |
| 12 | Biozym Gesellschaft für Enzymtechnologie mbH |
| 13 | C. Christophel Maschinenhandel & Vermittlungen GmbH |
| 14 | Cargo-Levant Schiffahrtsgesellschaft mbH |
| 15 | Carl Duisberg Centren Intertraining & Co.nsult GmbH |
| 16 | CobiNet Fernmelde- und Datennetzkomponenten GmbH |
| 17 | Controlware GmbH Kommunikationssysteme |
| 18 | CP ReifenTrading GmbH |
| 19 | Düllberg Konzentra GmbH & Co. KG |
| 20 | ESGE Textilwerk Maag GmbH & Co. KG |
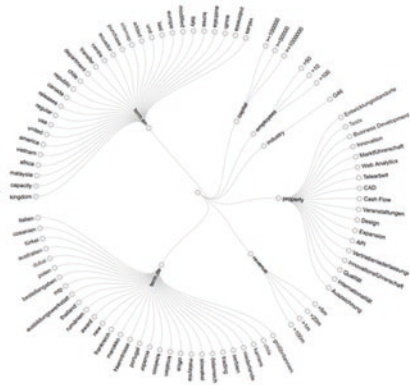
3. Important characteristics in the statistical customer profile for this list are certain Asian countries

```
"value": "korea",
"targetCount": 13,
"targetRate": 0.39393940567970276,
"totalCount": 7909,
"totalRate": 0.059923022985458374
```

```
"value": "vietnam",
"targetCount": 10,
"targetRate": 0.3030303120613098,
"totalCount": 4100,
"totalRate": 0.031063901260495186
```

4. Does a lead operate in certain Asian countries? Then it is a top lead

| | A | B |
|---|---|---|
| 1 | European Clothing Company GmbH | JA |
| 2 | Franz Kaldewei GmbH & Co. KG | JA |
| 3 | Fritzi GmbH | NEIN |

**Fig. 4.7** New customer acquisition for video conferencing system provider using Implisense. With kind permission of © Implisense GmbH 2022. All Rights Reserved

**B2B Smart Data**

Another provider is B2B Smart Data. Here, too, the interesting existing customers that one wants to clone are first recorded as a list. The algorithm analyzes the individual digital DNA of each website, which is exemplarily shown in Fig. 4.8. These are companies in the processing industry. The terms with larger font size appear more frequently and are therefore more characteristic for the DNA. Interesting is the term ATEX, which represents a European directive for explosion protection and is important in the industry. The term is so characteristic for the industry that it acts as a good identifier and can thus find better *look-alikes*, because it usually appears on the websites of these companies.

Now that the data basis has been established, the search for other similar companies can be done by an individual comparison of the websites. The degree of similarity is described by scores. In Fig. 4.9, a list of companies (from another industry) is shown, sorted by descending similarity. The own existing companies are marked with 1 and new

**Fig. 4.8** Digital DNA of a website analyzed with B2B Smart Data. With kind permission of © B2B Smart Data GmbH 2022. All Rights Reserved

companies with 0 in the third column. It is very clear that some interesting potential new customers appear, because they resemble the existing customers very much. Now, in principle, the acquisition can start from top to bottom. Of course, a prior analysis of the companies and the websites and a systematic identification of good hooks makes a lot of sense. However, one has a clear list of promising companies, where the effort is more worthwhile than with a random list.

## 4.2.2   Digital Lead Generation (DLG): Recognizing Buying Signals

For a forklift manufacturer, it is interesting to know that a Meier GmbH is building a new production facility, a Müller AG is expanding its plant or an architect has won the contract for the new hall of a company. This information is usually freely available on the internet. Companies publish such information on their own website, in the local press, via online PR, in social media and so on. For the forklift manufacturer, such information is worth gold, because the insights about an actual existing need and the timing are critical for success in sales. This example shows how new customers can be acquired using digital lead generation. For salespeople, such hooks are valuable and an impulse to become active, because a concrete need has been recognized. This applies to new and existing customers alike.

| UID | URL | Existing customer (1 = yes, 0 = no) | Rank Implement-ation | Score |
|---|---|---|---|---|
| UID_242358 | buerkert.de | 1 | | 21.265 |
| UID_981267 | lewa.de | 0 | 1 | 20.169 |
| UID_1309111 | rct-online.de | 1 | | 18.362 |
| UID_1057786 | mehner-gmbh.de | 0 | 2 | 16.441 |
| UID_771173 | hy-lok.de | 0 | 3 | 15.339 |
| UID_1652623 | vega.com | 0 | 4 | 15.083 |
| UID_17123237 | www.vega.com/de-de/home_de | 0 | 5 | 15.083 |
| UID_17747240 | www.mt.com/de | 0 | 6 | 14.558 |
| UID_1109573 | mt.com | 0 | 7 | 14.558 |
| UID_2753586 | best4automation.com | 0 | 8 | 14.530 |
| UID_1331006 | rembe.de | 1 | | 13.851 |
| UID_17781670 | flexim.com/de | 1 | | 13.669 |
| UID_3019251 | www.chemietechnik.de | 0 | 9 | 13.651 |
| UID_730251 | hnp-mikrosysteme.de | 0 | 10 | 13.375 |
| UID_1691000 | warex-valve.com | 1 | | 13.263 |
| UID_13878317 | schmachtl.at | 0 | 11 | 13.186 |
| UID_1224189 | pflitsch.de | 1 | | 12.839 |
| UID_909266 | knf.de | 1 | | 12.712 |
| UID_403467 | ebbecke-verfahrenstechnik.de | 1 | | 12.200 |
| UID_1733446 | wmftg.de | 0 | 12 | 12.128 |
| UID_721551 | hielscher.com | 0 | 13 | 12.098 |
| UID_291893 | coleparmer.com | 0 | 14 | 11.598 |
| UID_1381759 | samson.de | 0 | 15 | 11.254 |
| UID_185595 | www.bibus.de | 0 | 16 | 10.908 |
| UID_911035 | kobold.com | 0 | 17 | 10.764 |
| UID_534036 | flottweg.com | 0 | 18 | 10.668 |
| UID_17120762 | www.gea.com/de | 0 | 19 | 10.514 |
| UID_468127 | exmar.de | 0 | 20 | 10.440 |

**Fig. 4.9** Scoring list of similar companies according to the B2B Smart Data analysis. With kind permission of © B2B Smart Data GmbH 2022. All Rights Reserved

The digital lead generation can be done based on industries, geographic areas or even the company size and assigned to the right salesperson, so that the results can be integrated into the existing sales processes. This fits more easily into the existing sales process and can represent a helpful lead switch automatically.

**Echobot**

For example, the provider Echobot and the tool Echobot CONNECT play an important role in digital lead generation. Echobot CONNECT is a sales intelligence software that crawls publicly available sources and classifies the information contained therein about companies into buying signals. This means that one can easily filter the Echobot com-

| Sales | EARLY WARNING SYSTEM |
|---|---|
| • New foundation | • Management change |
| • Management change | • Litigation |
| • Funding | • Savings |
| • Expansion (abroad) | • Expectations missed |
| • Product innovation | • Dismissals |
| • Patent application | • Plant closures |
| • Acquisition/Takeover | • Strike |
| • Partnerships/Cooperations | • Delivery problems |
| • New customers/orders | • Customer complaints |
| • Research Findings | • Patents of the competition |
| • Expectations exceeded | • Payment difficulties |
| • Real estate purchase | • Falling prices |
| • New buildings/additions/extensions | • Scandal/Recall |
| • Team expansion/new hires | • Insolvency |
| • Job postings | |
| • Tenders | |

**Fig. 4.10** Exemplary economic signals with business relevance. © Hans-Peter Neeb 2022. All Rights Reserved

pany database by certain buying signals. As a result, one gets all the companies that have triggered the selected signal including the corresponding source. The intelligence of the tool can thus make business events of companies visible.

The signals can be both positive clues and negative in nature. In the sales scenario (Fig. 4.10), it is rather the positive signals that are interesting. These can be start-ups, initiatives, innovations, expansion and so on. Anyone who is active in the financial and credit sector and has to assess risks is more interested in negative signals. These include, for example, personnel changes, closures, missed targets, disputes or problems.

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**Practical Examples**

Let's take another look at the forklift manufacturer who is interested in early information about investment objects such as new production halls or manufacturing plants. This information can either be communicated by the construction contractor itself or also by architects, if they have won a significant tender and report on it officially.

For a personnel service provider (Fig. 4.11), the case is interesting in which a company is looking for staff. This is easy to identify by the addition "m/f/d" or "m/f/x" or similar. Especially if the automatic data scan tells you that the request is already over three months old, it may be time to involve a personnel service provider now, because your own advertisement may not be sufficient.

| | Forklift manufacturer | Personnel service provider | Online Marketing Agency |
|---|---|---|---|
| **Provider:** | | | |
| **Target Audience:** | Companies with a need for capital goods | Companies that are looking for new employees | Companies looking for new customers |
| **Buying signals from customers:** | Companies that<br>• Expand your production<br>• Build a new plant<br>• A new branch is being built by architects,<br>• Who won the tender for a company's new hall. | Companies that<br>- Have had a job posting online for more than three months (and apparently can't find a candidate). | Companies that<br>• Want to go to trade fairs and exhibit there<br>• Have new products/offers<br>• Have a new unit set up |
| **Search Criterion:** | Search terms describing the above use case 'Expansion'. | Job advertisements can be recognised by the text module "(m/f/d)". | The trade fair announcements can often be found on the companies' websites before the exhibitor directory is officially published. |

**Fig. 4.11**  Investment signals 1/2. © Hans-Peter Neeb 2022. All Rights Reserved

An internet agency is specifically looking for companies that want to go to a trade fair in the next six months and announce this on their website. Among the hits are several companies that need a new internet presence for this trade fair. By this timely and relevant occasion, the agency can win some new customers and orders. ◄

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**Practical Examples**

An IT system house (Fig. 4.12) is interested in growing and expanding companies. These companies usually have a need for more IT services. Thus, signals were interesting that indicate new locations or branches or when the acquisition of new customers or the establishment of new teams was communicated. Based on these important hooks, demand was recognized and new customers were acquired.

A provider of roof greening is interested in gaining early knowledge of new investment and construction projects. Especially in the public sector, it is easy to get this information, as such decisions are communicated early. It is about the construction of sports halls, daycare centers or other larger buildings. This information is freely available and free of charge on the internet. It can be scanned and assigned technically and automatically via press releases, newspaper or web articles, announcements of the administration or the parties. The analysis tools structure and sort this information. By selecting by region, type or client (public yes/no), this investment signal can be passed on to the right salesperson, who takes care of it and makes contact.

| Provider: | IT system house | Supplier for green roofs | Video Conference Software Provider |
|---|---|---|---|
| Target Audience: | Companies with need for IT equipment (HW, SW, services) | Companies planning a new building or renovations | Companies that use competitors' products/services |
| Buying signals from customers: | Companies that<br>• Expand your locations<br>• Establish a new branch<br>• Going to a new country<br>• Hire new team or set up new unit | Companies that<br>• Construct or renovate new office buildings<br>• Establish a new branch Architects,<br>• Who won the tender for the new building. | Companies that<br>- Communicate competitive (underperforming) products on the website to provide end customers with a video dialogue opportunity. |
| Search Criterion: | Search terms describing the above use case 'Expansion'. | Search terms that cover new constructions or renovations | The competitors can be identified on the basis of search terms on the websites |

**Fig. 4.12** Investment signals 2/2. © Hans-Peter Neeb 2022. All Rights Reserved

A provider of video conferencing software is specifically looking for companies that use a solution from certain competitors. This information is partly communicated openly on the websites. Compared to these competitors, one has some important advantages, because these companies already have experience with video conferencing and do not have to be convinced of the necessity, but only of the better solution. Thus, one can specifically address these companies and win new customers. ◄

As Fig. 4.13 shows, the use case or application scenario is defined in the first step. Based on this, selection criteria and keywords can be derived and incorporated into the filter. To further focus, additional selection criteria can be inserted into the scan to concentrate on specific regions, industries or company sizes. The company lists are supplemented with as suitable contacts as possible, which can be found on XING or LinkedIn® for the companies. In some cases, contact details such as the email address or phone number are added, which simplifies the approach. The information that was officially analyzed can be used as a hook.

There are now interfaces and APIs (Application Programming Interface) that allow data to be automatically and semi-automatically transferred directly into a CRM system. For example, you no longer have to enter contact details of decision-makers, but simply transfer them. This makes the work of the salespeople easier and increases the acceptance of these digital tools. They give the salesperson more time for the actual task: understanding the customer better. By linking, connecting and integrating the digital systems, efficiency is increased.
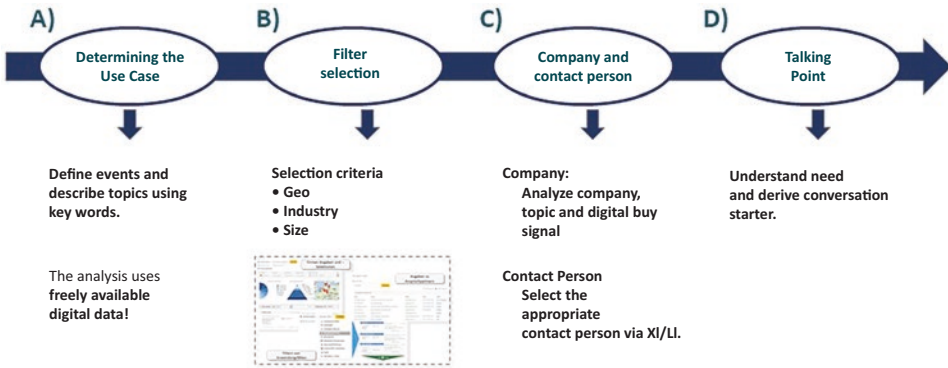
**Fig. 4.13** Procedure and process steps. © Hans-Peter Neeb 2022. All Rights Reserved

### 4.2.3  Understanding Website Visitors: Identifying Needs and Time Frames

Analyses say that about 97% of website visitors remain unrecognized. Intelligent, data-driven tools enable companies to identify the visitors. There are digital tools and data services that can provide these insights for B2B companies of a certain size. The IP dial-in addresses of the companies are matched with the real data such as company name, address and website in company databases. For the provider, it is often valuable to know that a company was on the website, which areas were viewed, how often and how long the visits took place. Obviously, there is a specific need. If you can determine or estimate the contact person of this company, this is a concrete hook for a salesperson to become active. This applies to both new and existing customers.

You can have these analysis results displayed, for example, as daily reports or be notified immediately by email. In the first case, the report goes, for example, to the sales manager or the sales assistant, who then forwards this information to the right salesperson. For existing customers, it is clear which salesperson is assigned. For new customers, there is a rule as to which salesperson should be responsible for processing the new contacts.

**Practical Example**

A mechanical engineering company has been continuously monitoring the activities and visitors on its website for years. In particular, it pays attention to which subpages and products were visited individually. The responsible salesperson usually contacts the relevant company by phone. He then presents the specific type of machine that was in focus when visiting the website. This direct address of the need leads to a regular sale of machines that call up a six-figure price. The costs of the LeadingReports version, on the other hand, amount to about 200 € per month. The achieved ROI

(*return on investment*) is therefore immense. The mechanical engineering company observes its customers in a separate subfolder in the LeadingReports backend and can score additional sales points in case of renewed demand, for example for spare parts. For the context, it is important to understand, compared to certain other industries, that more time is needed for the procurement cycles in the mechanical engineering industry. Thus, by observing, analyzing, contacting, following up and so on, a good situation can be created to continuously and significantly increase the probability that the customer will opt for one. There are other fast-moving industries where this is more difficult. ◄

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**Practical Example**

A customer in the ERP services sector is positioned in the middle of the classic B2B business and also uses LeadingReports successfully for several years. The salespeople work directly with the backend of LeadingReports, which pushes in the current visits over the day. The service provider reacts directly to the research of potential new customers and addresses suitable and interesting companies specifically. In the approach, the focus is mainly on the need and not on the recognition. Sentences like: "We have seen that you visited our website" are not used. The visit and the company are analyzed more closely. It is important to understand what the company does and what the spectrum of needs could be. This requires some preparation time. Then, a concrete proposal is communicated when contacting. This approach has proven to be good in practice. ◄

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**Practical Example**

An interesting case from the machine tool industry is a dealer of large CNC milling machines in the six-figure range and more. A lead report tool reported the visit of an existing customer on the website. The information was forwarded to the responsible salesperson. He was surprised because he had no knowledge of a current need. A short call clarified the situation, because the existing customer was in a current tender and informed himself about possible providers. This way, the salesperson was able to enter the process early and deliver the desired information personally. ◄

---

**Practical Example**

Another example is an agency that offers apps. They noticed that the German branch of a global corporation for entertainment and mobile electronics was on their own website. In particular, the users looked at the app development area more closely and for a longer period of time. It was also recognizable that this happened on several days and therefore could not be a sporadic random hit without intention. Via XING and LinkedIn® they quickly found out the possible contact persons in marketing who are responsible for digital tasks and contacted them. The hook was not "You were on our website", but "We are an agency that also develops and offers apps, isn't that something for you?". In fact, conversations and even a deal came about. ◄
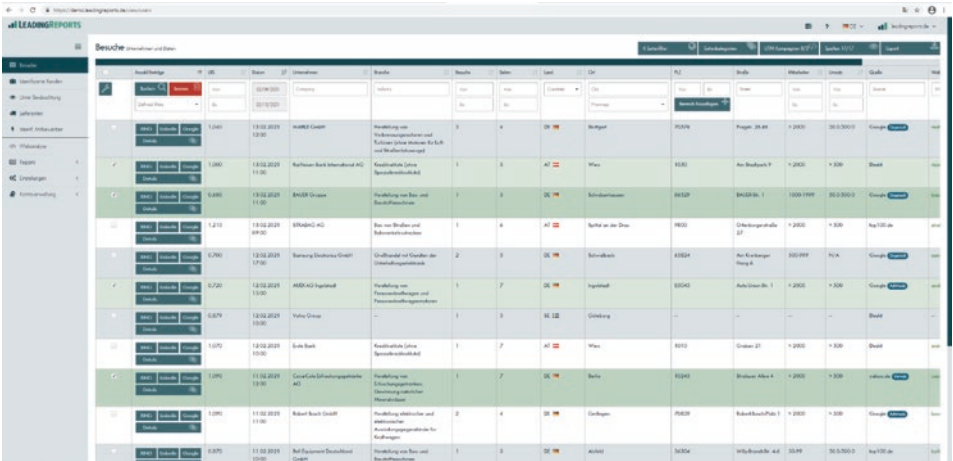
**Leading Reports**

We want to take a closer look at a concrete tool from practice. The figures contain demo data for data protection reasons, but the principle can be explained very well.

The visits of the companies on the own website are continuously tracked and recorded. The overview display creates a simple visitor list (Fig. 4.14), which is grouped by company and sorted in chronological order. This way, one can see which companies visited the website on which day at what time with how many visits and how many pages. There are of course further information in the overview such as industry, country, city, zip code, number of employees, revenue and the source of how they came to the website. For the latter, there are options such as direct entry of the URL, Google search, other bounce marks (such as directories) and so on.

By clicking on a company, one can call up the detailed view (Fig. 4.15) for it. There one also receives important information, for example which subpages on the website were visited. As can be seen in Fig. 4.15, products A and D were viewed much longer compared to product B. This information is very helpful, because one can address the customer on the offers A and D.

In practice, however, it is recommended not to tell the person called directly that one has seen his website visit. Especially in Germany, this directness is not very popular. But the statement that after research the product A, in the industry or based on experiences with other companies also the product D could be interesting, is suitable for everyday use and has proven itself. Without guessing or laboriously testing hypotheses sequentially, one gets directly to the point and to the relevant topic. This saves both sides time,



**Fig. 4.14** Leading Reports with demo data (overview of company visits). Courtesy of © LeadingReports GmbH 2022. All Rights Reserved
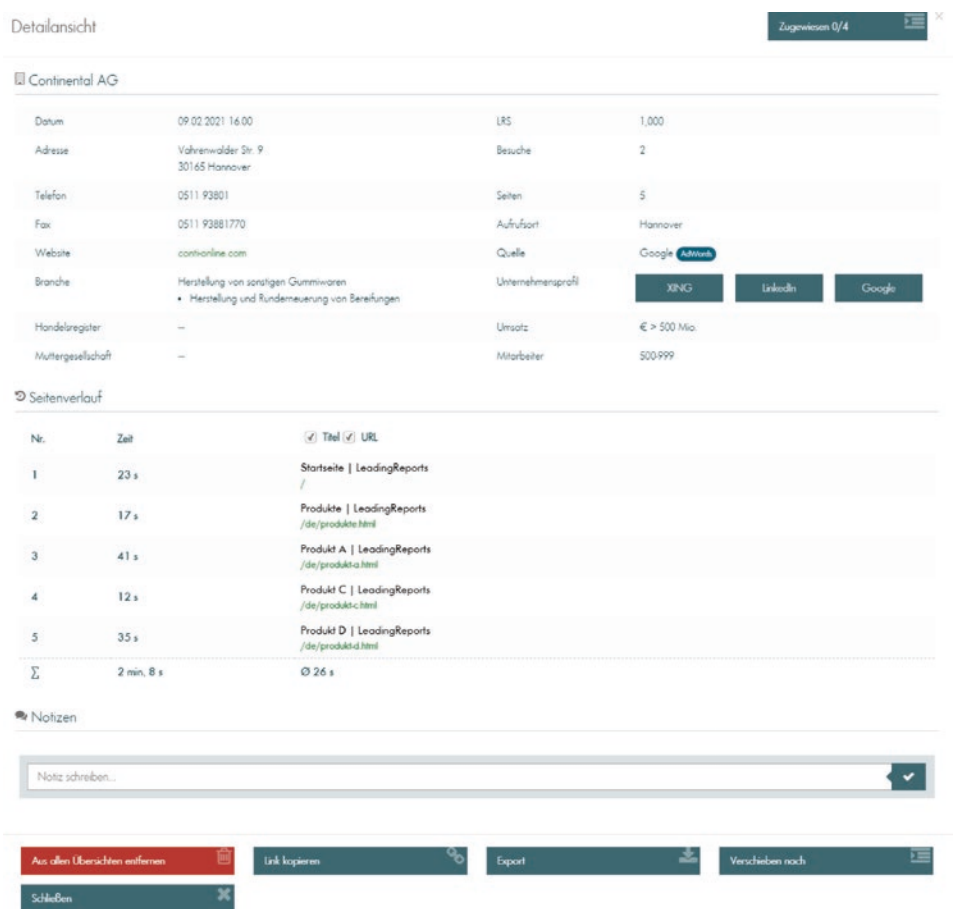
**Fig. 4.15**  Leading Reports with demo data (detailed view of a company). Courtesy of © LeadingReports GmbH 2022. All Rights Reserved

and one quickly gets the answer whether there was real interest and whether it is a lead that should be followed up.

In addition, one has the possibility to use filters (Fig. 4.16) to select the suitable companies. These include federal states, postal code areas, cities, industries, employee or turnover size classes and minimum number of visits or page views. These selection options help to assign the different cases to the right salespeople. This can happen once a day or when an event occurs, an immediate information can be sent to the assigned salespeople. In this way, the analysis insights are directly integrated into the sales process and aligned with the organizational structure. Regarding the data accuracy, it should be noted that in Germany up to 45% of the company visits can be identified. (Leading Reports, n.d.)
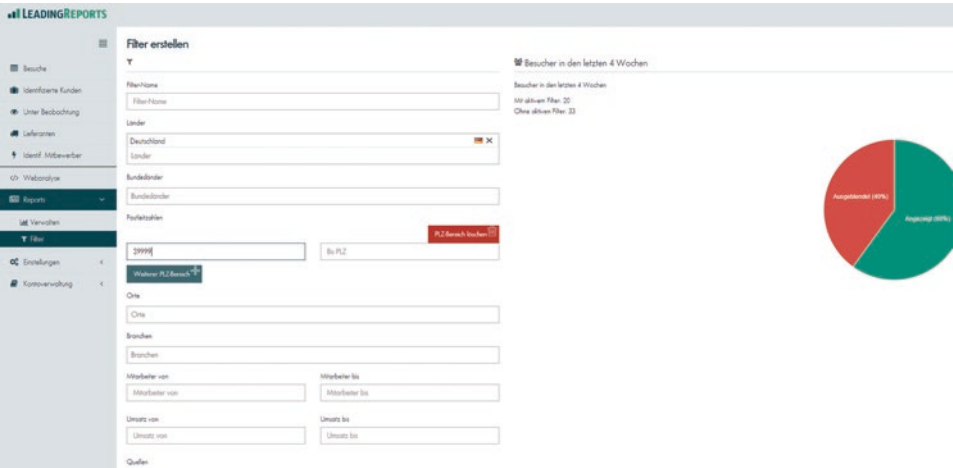
**Fig. 4.16** Leading Reports with demo data (filter function). With kind permission of © LeadingReports GmbH 2022. All Rights Reserved

## 4.2.4    Recognize and Visualize Referral Bridges

If one has now recognized a company with current demand and also identified a (possible) decision maker, the question arises how the approach should be done. As we know from studies, a referral bridge is much more successful than a cold contact. For this, the connections between people are important. We know something similar from networks like XING and LinkedIn®. In addition, however, other important sources are used that reveal interesting things. It is important to know that these are public, digital sources. The special thing is that the contacts of these sources are linked and visualized. This makes valuable insights about personal relationships visible. The public personal data include, for example, the commercial register (managing directors, authorized signatories, supervisory board), chamber of commerce information (committed persons), association information, leading persons in clubs or social organizations (for example board mandates in Rotary, Lions or trade associations), political committees and other examples. Only information that serves the public interest and is publicly (websites, social media pages) accessible is collected. The linking is done quite reliably by first and last name, city and possibly date of birth. Through such connections, a salesperson knows that people know each other and can try to get a referral through these relationships. Both current and past connections can be examined. Even if people sat on a common supervisory board, for example, three years ago, they are certainly still acquainted and perhaps even familiar today.

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**Practical Example**

For example, one finds out (Fig. 4.17) that the interior minister is connected to the CEO of a consulting firm through the working group IT summit, who in turn is
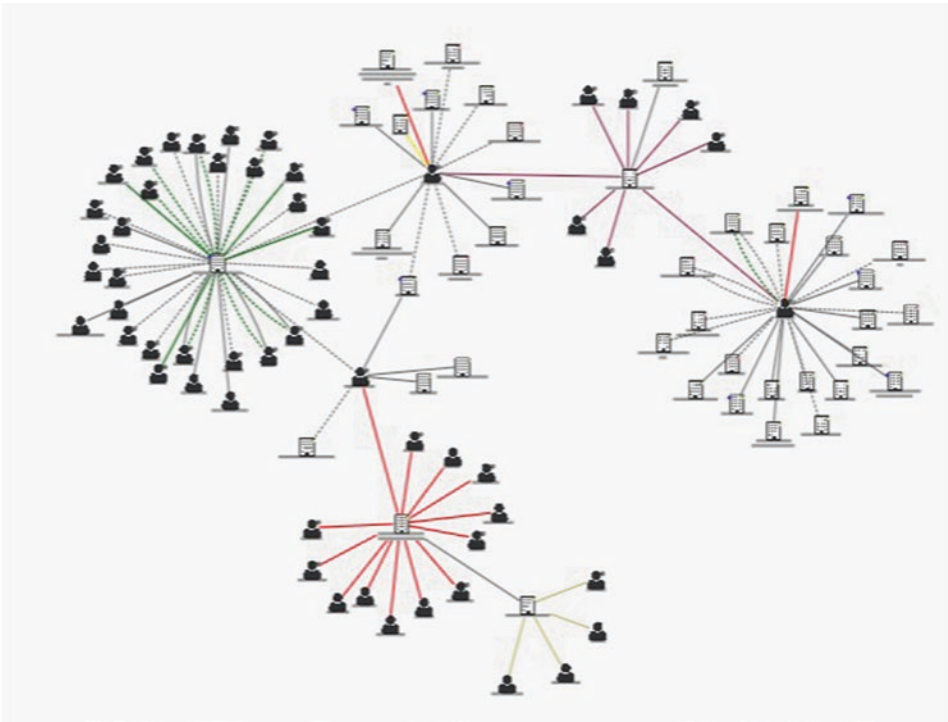
**Fig. 4.17** Make relationships across different networks visible (referral bridges). With kind permission of © Palturai GmbH 2022. All Rights Reserved

connected to a local entrepreneur and managing director through a colleague who is also involved in the regional chamber of commerce through the presidency function. The interesting thing is that these connections can be easily visualized by a continuous drill-down at the push of a button. Thus one knows who is connected to whom why and what about. This can make referral bridges visible that one can go over. These data sources are all public. They are only linked and visualized by digital tools. ◄

**Practical Example**

In a key account organization of a forklift manufacturer, the question arose how certain corporations as potential customers could be won, but also how existing customers could be better developed. For this, the connections of the own board with the boards on the target side were examined more closely, in order to find direct referral bridges. These own board members were directly contacted with the information about the desired target contact. It was jointly explored how good the contact was and whether the board member could specifically help with the acquisition of this target customer. This way, new connections were found and used and new contacts for the key account management were established. ◄

**Practical Example**

The credit department of a bank asked itself the question of which new business customers it should acquire. However, it also took into account which customers it wanted to have for solvency reasons. An interesting correlation was found: From analyses, it could be seen that companies and especially the owners who were in contact with several other companies that had gone bankrupt or had payment difficulties were also directly linked to other companies and owners with the same indicators. This is a pattern of the *neighbouring effects*, which says that "birds of a feather flock together". These important indicators were decisive to avoid and not acquire exactly these companies. Thus, an early warning system with another factor was found and used in one's own process. ◄

Digitization tools in sales help the sales people in acquisition activities to answer the question of which acquisition targets to focus on. They enable a better focus on where the best potentials with the least effort are to be expected, and facilitate the work. For existing customer activities, the tools help to identify which customers may currently have a need and where the right time window has come to intensify the dialogue. This applies both to the visit of one's own website and to the recognition of digital investment signals. In addition, the tools make clear where referral bridges arise that can be used practically to make the task easier. On the one hand, hints are given as to which companies and contacts to align with how and why. On the other hand, further insights can be gained to fill the account journey analysis in the respective steps and to better understand the customer. Especially for competitive observation, we can generate important information to look at the environment in which the customer and the individual members of the buying center are located. Exemplary tools are Palturai and PROMISE by Axon Insight.

**Palturai**

Some visual examples are intended to illustrate the tool from Palturai once again. In the business graph of Fig. 4.18 you can see the relationships to CRONIMET GmbH. The blue arrows show on the one hand participations of CRONIMET. On the other hand, the shareholders of CRONIMET can be seen. The gray lines indicate the current managing directors. The authorized signatories are indicated by the green lines and orange connections stand for profit transfer agreements. Thus, the network of companies and persons becomes quite clear. The white numbers in the green circles at the top right of companies or persons indicate further connections that can be viewed by double-clicking if interested.

Also exciting are the details of the individual shareholder relationships, which can be seen in Fig. 4.19. These data are taken from the shareholder list in the commercial register. In this way, the shareholding ratios as well as majority/minority shareholdings, blocking minorities (25%) and free float shareholdings (10%) are clearly visible.
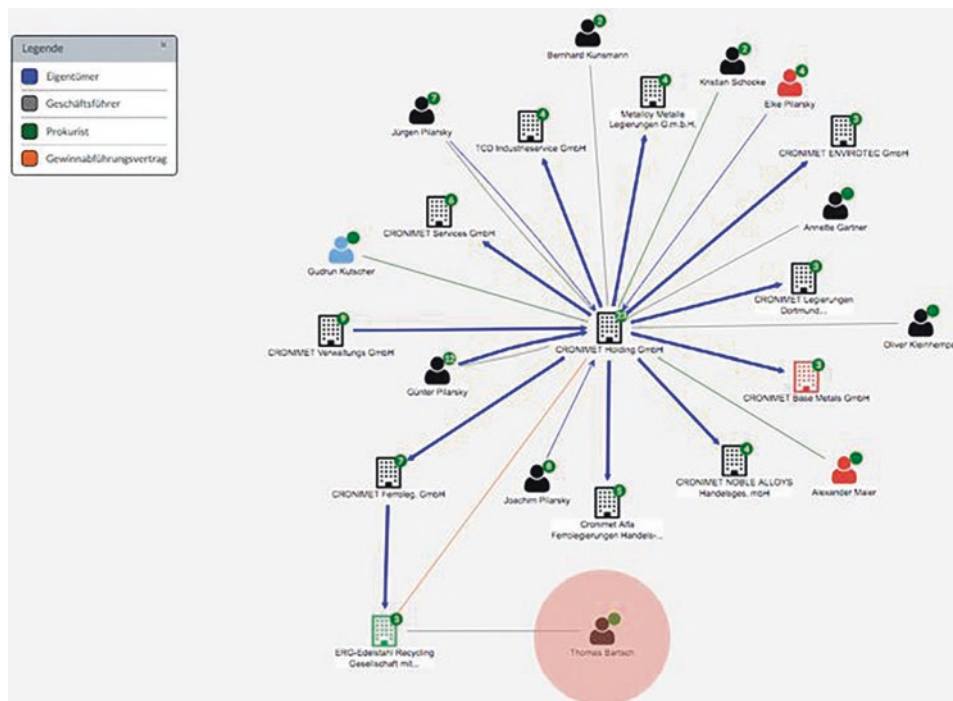
**Fig. 4.18** Representation of the relationships to CRONIMET GmbH with Palturai. With kind permission of © Palturai GmbH 2022. All Rights Reserved
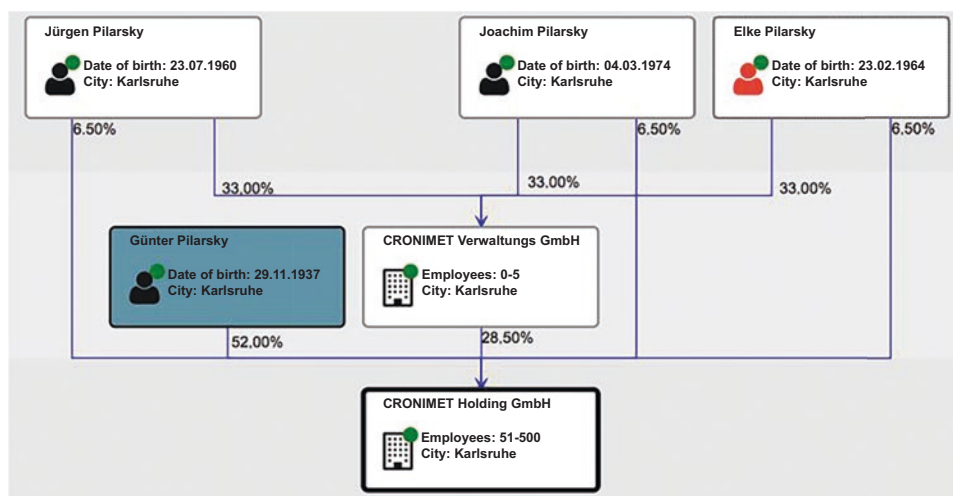


**Fig. 4.19** Displaying the shareholder relationships with Palturai. With kind permission of © Palturai GmbH 2022. All Rights Reserved
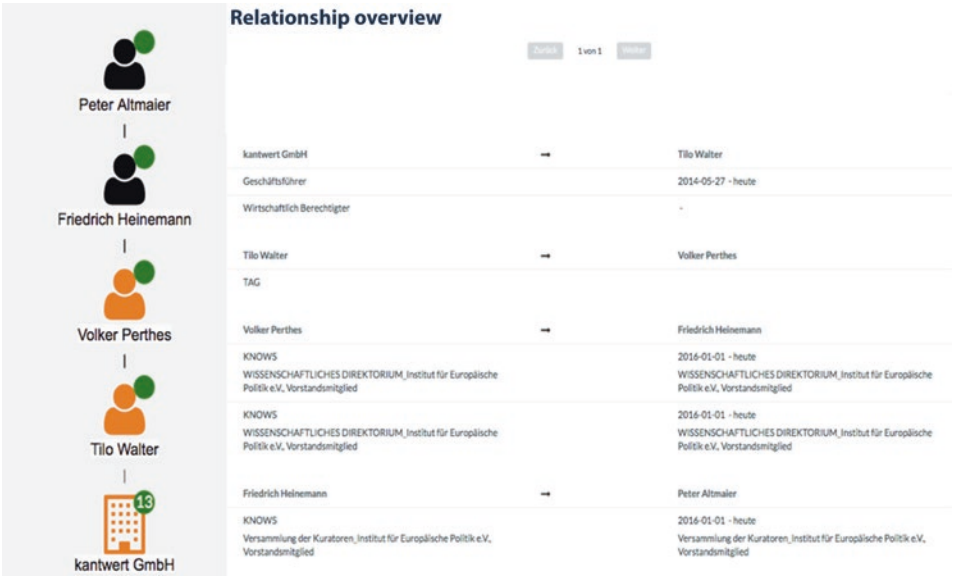
**Fig. 4.20** Making indirect connections and referral bridges over several stations visible with Palturai. With kind permission of © Palturai GmbH 2022. All Rights Reserved

Interesting are also the visualization of indirect connections over several stations or personal connections, as shown in Fig. 4.20. In this example, Tilo Walter, the founder and managing director of Kantwert (today Palturai), is connected via two corners with the former Federal Minister of Economics Peter Altmaier. It cannot be seen whether this is actually a viable connection that can serve as an effective referral bridge. But this connection is at least validatable and usable.

Finally, a brief example in Fig. 4.21 is shown. It illustrates once again the set structures of connected companies and the data depth. Here, 19 companies were randomly selected as an example. It shows revenue sizes, share capital, number of employees and the regions. On the right, the information of the 196 directly connected persons and on the left the 87 directly connected companies are displayed. For the persons, in addition to the roles, the average age and the estimated wealth are also given. In total, 1431 companies are connected in different intensities via these contacts.

One can clearly see from these practical examples what kind of relationship and depth information a salesperson receives through the tool from Palturai to better understand the network of a potential or existing customer. He recognizes roles, power influences and referral bridges that could be important for him. The graphical representation of the connections is the essential advantage, because the information is publicly available. However, these data are only available in tabular form. Only Palturai shows graphically the relationships in the business graph. This is the actual leap in knowledge.
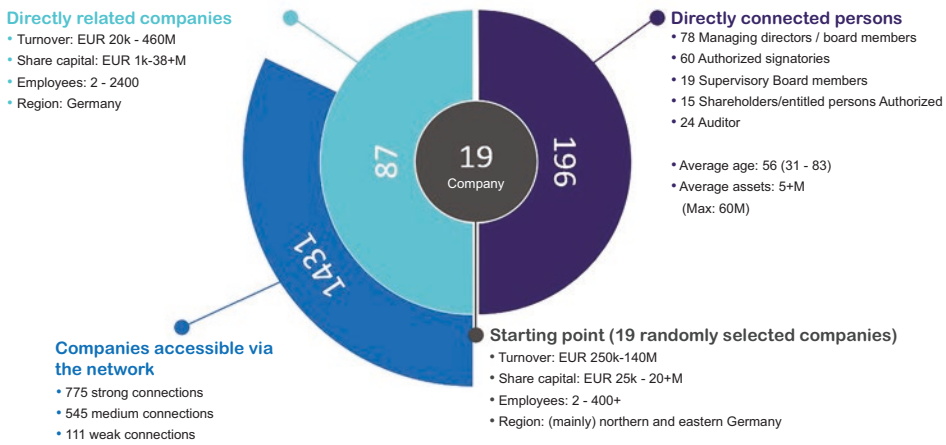
**Directly related companies**
- Turnover: EUR 20k - 460M
- Share capital: EUR 1k-38+M
- Employees: 2 - 2400
- Region: Germany

**Directly connected persons**
- 78 Managing directors / board members
- 60 Authorized signatories
- 19 Supervisory Board members
- 15 Shareholders/entitled persons Authorized
- 24 Auditor

- Average age: 56 (31 - 83)
- Average assets: 5+M
  (Max: 60M)

87

196

19
Company

1431

**Companies accessible via the network**
- 775 strong connections
- 545 medium connections
- 111 weak connections

**Starting point (19 randomly selected companies)**
- Turnover: EUR 250k-140M
- Share capital: EUR 25k - 20+M
- Employees: 2 - 400+
- Region: (mainly) northern and eastern Germany

**Fig. 4.21** Information on the connections and data width of the companies and persons in Pal-turai. With kind permission of © Palturai GmbH 2022. All Rights Reserved

### 4.2.5 Predictive Selling—Predicting Customer Behavior

A good support for the salesperson is the customer-specific prediction of what the next successful step with the customer can be. For this purpose, one can use predictive sell-ing, which predicts which offer (*next best offer*) will meet with a positive response from the customer. For example, tools can be used that can recognize patterns using artificial intelligence, perform scorings and make predictions based on them. For example, one can identify opportunities to realize additional cross-selling possibilities in the best way to increase sales. Furthermore, one can determine where to counteract migration tenden-cies to avoid and compensate for sales declines. Finally, one receives suggestions where the sales department can apply possible price increases with the customer to increase sales. Qymatix and Hadoco are mentioned here as examples.

### 4.2.6 Overview of Different Providers

In recent years, several tools and providers have established themselves that support sales activities and show them new ways. These include, for example, providers such as Implisense, DATAlovers, echobot, Leading Reports, Palturai or Axon Insights. The list is certainly not complete and no recommendation for a single tool should be given, as this depends on the individual needs.

The purpose of use can be schematically divided into four areas to give a first ori-entation: Lead Generation, Acquisition, Growth and Loyalty. The decisive factor is to develop one's own strategy, what one wants to achieve why and how. How and where can the digital tools in sales provide support? The tools have different meanings along

| | Lead Generation | Conversion | Growth | Loyalty |
|---|:---:|:---:|:---:|:---:|
| Implisense B2B Smart Data | ✓ | ✓ | | |
| echobot | ✓ | ✓ | ✓ | ✓ |
| LEADINGREPORTS | ✓ | ✓ | ✓ | ✓ |
| FALTURAI AXON INSIGHT | ✓ | ✓ | ✓ | ✓ |

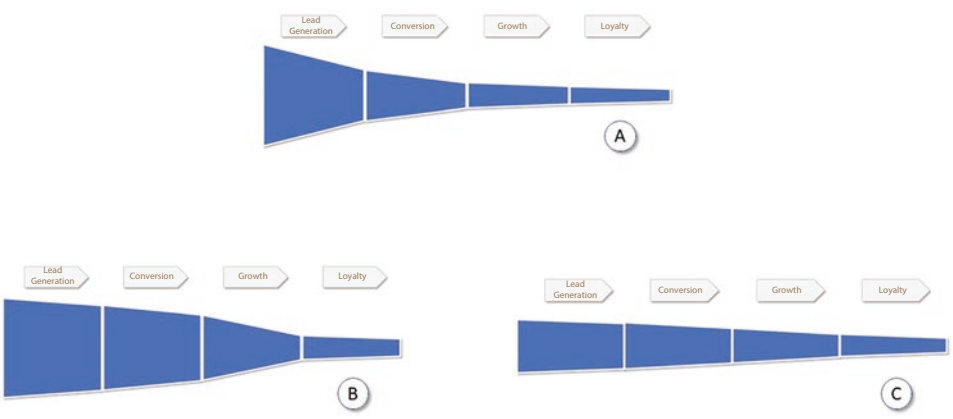**Fig. 4.22**  Overview of digital tools. © Hans-Peter Neeb 2022. All Rights Reserved

**Fig. 4.23**  Lead funnel. © Hans-Peter Neeb 2022. All Rights Reserved

the lead funnel. If one simplifies the lead funnel into the four phases of lead generation, acquisition, growth and loyalty, one can see in Fig. 4.22, that some tools focus more on lead generation and acquisition and others cover the other phases as well. Here, no priorities are given in detail, but only whether a use fits or not. Now there are various relevant considerations to decide where to start and what the next steps are.

One exciting aspect is, for example, the shape of one's own lead funnel. This gives a first indication of which challenge needs to be solved. Let us assume an exemplary lead funnel A as in Fig. 4.23. This visualizes the ratios between the originally addressed

companies, those that were converted, those that were expanded, and those that became long-term, successful customers. It shows that naturally not all contacts can become customers, growth customers or loyal customers. The decisive factor is the shape of the funnel. More precisely, it is important how much the number of companies decreases from phase to phase. If a stronger decline is observed, there may be a problem. The second important observation is in which phase the decline is observed. There may be only a problem at this point. If the decline is relatively low or flat, there is a stable or healthy lead pipeline.

Interesting, for example, is the lead funnel B. It can be seen that in the left area of lead generation and conversion the pipeline is still pronounced and healthy. Only in the right area with focus on the growth phase, a striking weakening occurs. This means that many of the acquired customers do not enter the growth phase and may not become profitable. However, they again reach the loyalty phase and become long-term customers. Now, based on this consideration, the question may arise how to achieve growth with certain customers. The tools Implisense and DATAlovers are less helpful for this. On the other hand, one can use echobot to specifically search for further opportunities, for example, to achieve cross- and up-selling or to make the company a strategic customer. Furthermore, one can increasingly rely on using Leading Reports or Wired Minds to identify the opportunities when the existing customers were on one's own website to inform themselves. These insights can be used to analyze specifically. In addition, one can use Palturai or Axon Insights to expand one's network of contacts at the customer and conduct deep acquisition.

However, it is important to note that a pure tool selection does not significantly help. Without the AccountJourney® method, these approaches also remain rather tactical in nature. Only if one uses the additional information correctly, can they generate real, lasting growth. But the digital tools can be an important help in this.

Also interesting is the flat but healthy lead funnel C. It is characterized by the fact that it has few losses from phase to phase. This means that a large part of the contacts that are addressed are also converted to customers, enter the growth phase and become long-term, loyal customers. This is a stable behavior and speaks for the effectiveness of marketing and sales in the funnel course. Striking, however, is that the number of contacts at the beginning in the lead generation phase is quite manageable compared to the previous figures. Since the funnel itself is functional, one can think about increasing the number of contacts and expanding the lead generation phase. Thus, more contacts flow into the funnel, which should lead to a steady increase in all phases, if the funnel actually turns out to be healthy. Now it makes sense to mainly access the tools that bring more contacts. For example, Implisense and DATAlovers play a role here, because with them the number of contacts can be actively increased and thus the acquisition universe can be enlarged. In addition, one can actively search for sales opportunities with the use of Echobot. The measures can be supported in the further course by using Leading Reports or Wired Minds, by additionally making visible the opportunities when new or existing customers were on one's own website and this information is used for targeted

acquisition. When the use of Palturai and/or Axon Insights makes sense, must then be considered individually after a situation analysis.

Again, the importance of the AccountJourney® method should be pointed out, in order to use the new information sensibly.

### 4.2.7   Custom Audiences

An important question is also the transfer of audiences to other digital networks or digital platforms. This approach is helpful because it allows you to either reach the same contacts additionally and supportively or to address other, new contacts. Both enhance your own acquisition efforts. The interesting thing is that company lists are actually a common currency and you can transfer them from one platform to another. The procedure usually falls under the category of custom audiences. In particular, the method is possible on LinkedIn®.

In this procedure, a company list is created in a tool (source platform), such as Echobot (Fig. 4.24), transferred to a platform, such as LinkedIn® (target platform), and then LinkedIn® Ads are played out to the employees of these companies. This way, you can address these companies, for example, in parallel via LinkedIn® in addition to a direct approach and increase the chances of success.

In the first step, the desired target group is mapped and selected in the source platform by means of selection based on certain criteria. This target group is exported as a company list. This is usually done in the generally valid CSV format. The necessary attributes are determined by the target platform. These often include company name, website URL, website domain, LinkedIn® URL, industry, city, country, zip code, and so on. The more criteria are available, the more precise the matching is. We do not go into detail here about certain cleansing (e.g., eliminating private email addresses) and conversions
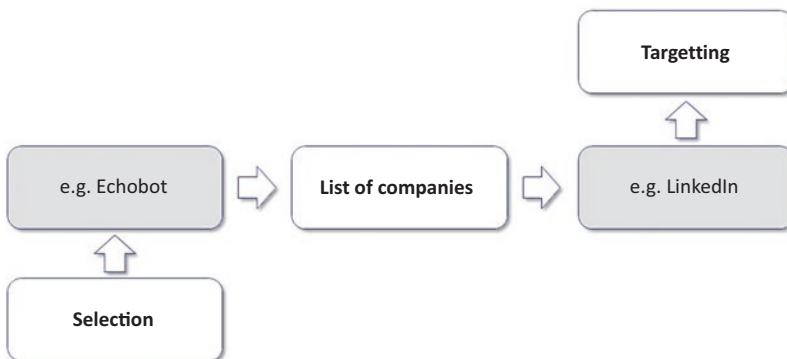


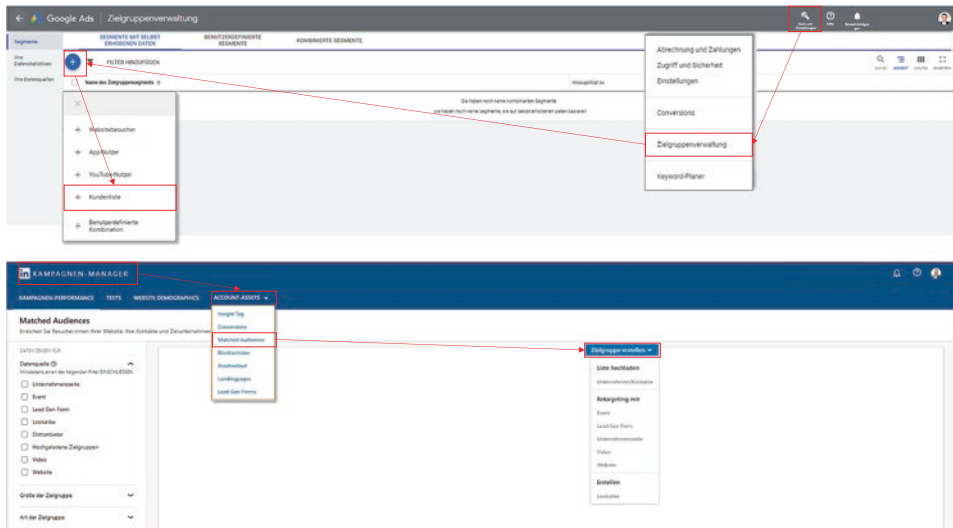**Fig. 4.24**   Custom audiences. © Hans-Peter Neeb 2022. All Rights Reserved

**Fig. 4.25** Forming custom audiences with Google and LinkedIn®. © Hans-Peter Neeb 2022. All Rights Reserved



**Fig. 4.26** Selecting custom audiences in LinkedIn®. © Hans-Peter Neeb 2022. All Rights Reserved

(e.g., München to Munich) of some data fields that increase data quality. At least 300 companies should be selected and exported to achieve a good matching.

This file is imported into the target platform (Fig. 4.25) and the matching takes place there. Now a campaign can be set up on this list to target the employees of these companies specifically. In doing so, you basically address all contacts of these companies (Fig. 4.26), unless the target platform is further restricted by selection criteria such as "managing director". Therefore, it can also make sense to remove very large companies beforehand in the original company list, so as not to catch corporations with hundreds of thousands of employees and then spread too broadly. On LinkedIn®, the focus is on companies, which is in line with the GDPR in Europe, as no personal data is exchanged.

On platforms such as Facebook and Google, you could also exchange and address person lists. This is not allowed under GDPR in Europe without the direct consent of the individual person, as personal data is processed. In the USA, however, it would be allowed.

Custom audiences work to reach specific target groups. They are also more targeted and effective than thesis-based approaches, as practical tests and monetary comparisons have shown.

The insights that you gain with digital tools, especially so-called buying signals or sales triggers from Sect. 4.2.2, can help you to better understand the customer's goals and strategy. They can serve to make the strategy alignment easier, but are also a good source to analyze the *Voice of Market* in Sect. 2.3.

## 4.3    The Importance of Social Selling

Social selling is mainly about relationship management via digital and social media in the context of B2B sales. In particular, B2B networks such as LinkedIn® and XING are important. Besides relationships between companies, relationships between individuals, especially those of the buying center, are significant. This applies to both new and existing customers. On the one hand, the analytical possibilities, on the other hand, the direct communication possibilities and, furthermore, the functions for direct advertising are interesting.

A few years ago, it was still doubted that social media plays a role in the B2B sector. This skepticism has since given way and been refuted by the practical benefits. LinkedIn® and XING are hardly imaginable without. Even on platforms such as Facebook, YouTube or Instagram, B2B topics take place today and companies should be present. This applies to both manufacturing companies and service providers. It is about getting visibility, gaining followers, receiving positive feedback that is also visible, and motivating people to share your own content.

The benefit is that on the one hand you can tap into new target segments, customers or opportunities. In addition, you can more easily identify and understand the relevant people of the buying center. Moreover, their connections to other people, especially those of the potential competition, are visible—which also applies to existing customers and their contacts. This is especially useful for deep acquisition and for acquisition in other business areas of this customer.

This research makes the work in sales much easier, because you can access important information, such as which person at the customer belongs to which business area, in which country, in which department, what role he has and how you can reach him directly. These are information that you hardly had or only with great effort at hand before. For this you needed the customer's phone book or had to do otherwise costly research and often bother the customer's switchboard to get (slowly) an understanding of the organizational chart on the customer side. Thus, you can also call these social networks with B2B reference as partly public CRM system. You can take first essential

information from these networks for your own CRM system and then gradually expand it. In part, you can also transfer your own lead data from the social network (in)directly to the CRM system.

Customers and their contacts are also found on social networks. They have a profile with further information and create or share content. Thus, it is recognizable what they are interested in and what their preferences are. Especially interesting is also who they are otherwise connected with within or outside their own company and who likes or shares their content. These are important insights for analysis. Relationships between people become more visible in this way.

An important aspect of social selling is the fact that the salesperson suddenly becomes a brand and a public broadcaster himself. He gets a recognizable profile through his presence and behavior, which attracts attention. He shares or generates content himself, which can be relevant. Especially sharing content can clearly underline your own expertise and bring yourself as a person into the *relevant set* of the (potential) customer. You can present your own skills, qualifications and career path in your profile, so that outsiders can better assess you.

A very important function in social networks is linking with other people, especially on the side of the (potential) customer. This ensures that you perceive more and more content of the other person. In particular, it offers the possibility to communicate directly and easily with this person.

Regarding the effectiveness of social selling, LinkedIn® points to studies (LinkedIn, 2021) that say that people with a higher SSI have more success. For example, people with a larger SSI create up to +45% more opportunities than others. 51% of them achieve better goals than the rest. 78% of users of social networks outperform their colleagues who do not use these digital media. Further information on social selling on LinkedIn can be found in the book "Growth Hacking LinkedIn™" (Radde, 2021).

## 4.4  Digital Listening

An important aspect of digitalization in sales is not only that we find partly millions of data and information on the internet, but also that there are digital tools that analyze these unimaginably large amounts of data for us through automatic data scans. Based on predefined keywords, we are able to quickly get clues as to where potentially interesting information might be located. This is done with digital listening tools.

This process does not run fully automatically, because human intelligence is still required to understand and assign content, but the search processes run fully automatically, which gives people a huge advantage in the targeted search for information. The analyses help with existing customers, potential customers or with a view to the competitors of the customer as well as our own competitors.

Especially in the context of the AccountJourney® analysis, we can gain very valuable insights into the different steps:

- What strategy does the (potential) customer communicate at the level of the company or the business unit or the region?
- What goals are pursued and communicated externally?
- What is communicated about specific use cases or scenarios?
- How are products and their performance perceived?
- What do the customer's competitors communicate?
- What do our competitors communicate?
- Do individual persons (decision makers) communicate something? Why? With what attitude or experience?
- What do external consultants communicate?
- What do external reporters and journalists communicate?
- Do we learn anything about strengths and weaknesses?
- What is reported about projects?
- What is reported about won tenders?
- What are the highlights or milestones that are reported?
- Are there any new product announcements?
- At which trade fairs or conferences is one involved?
- Are there any new activities in certain countries or regions?
- Have any key positions been newly filled?
- Have any awards been won?
- etc.

These information can be found at very different places on millions of websites in different countries and languages:

- Website of the companies
- Press information of the companies
- Investor relations section on the website of the companies
- Social media pages of the companies
- Social media accounts of acting persons
- Social media of other stakeholders
- Special topic forums
- Business media or industry media
- Pages of trade fairs, conferences and events
- Presentation information on third-party pages
- etc.

Content that can be essential is created everywhere.

The insights that can be obtained through digital listening can help to better understand the customer's goals and strategy. They can serve to make the strategy alignment easier and also provide a good source to analyze the *Voice of Market* in Sect. 2.4. As examples, the tools of the providers VICO Research and ubermetrics are mentioned.

## 4.5   Conducting Interactions with the Customer

There are technologies that can also support direct dialogue or interaction with contacts at the customer. In some cases, the interactions are already fully automated (Sect. 4.5.2) today.

### 4.5.1   Customer Conversation Management (CCM)

We consider here systems for customer dialogues or customer conversations (*customer conversation*), which can usefully complement CRM systems. The CRM is the central place for customer-related information. It provides the 360-degree view of the customer. However, the question arises whether such powerful tools can support direct and personal customer conversation in consulting or presentation. Because on the one hand, one does not want to give the customer direct insight into the customer file, on the other hand, one would not be focused enough in the conversation due to the multitude of fields. Also, the multimedia support in the form of product brochures and videos, price information or product-related checklists and configurations is missing at this point. In the sense of an optimized customer conversation, new mobile apps support. Using a flexible app platform, specific apps can be played out to the sales force depending on the application scenario, customer or other occasions. Here, live access to the CRM is made, but only the fields and information are pulled together that are relevant for the conversation at this moment. The salesperson is guided by a form design of the front end. In addition, there are focused multimedia content that are decisive for a positive conversation result. The app or the corresponding digital device becomes the center of the conversation. Together with the customers, parameters are recorded, product information is viewed and follow-up activities are defined. After the conversation, the digital customer file is synchronized with all relevant internal IT systems. In the CRM, customer data is supplemented, new opportunities are created or existing ones are supplemented, offer calculation systems are played or tasks are created in the ERP system or ticket system. The sales force does not have to prepare anything and can focus directly on the next customer conversation.

We look at the example of the Sales & Service App from entergon, which builds on a CRM system or is connected to the ERP system, to conduct the conversation with the customer in a user-friendly and simple way. In fact, there are some arguments for an additional tool that is integrated.

**entergon**
This application is used by salespeople, sales representatives or service staff during the personal conversation with the customer, for example on an iPad or laptop, to record information or support what is said. Typical situations can be trade fairs, customer conversations or the customer's production. On the one hand, it is about the comfortable

recording of contact data, which either takes place via a simple barcode, a business card scan or a manual keyboard input. If it is an existing customer, the app can directly display the current sales from the ERP system and the open offers from the CRM system, to be fully in the picture in the conversation. On the other hand, qualifying information plays a role, for example to note in which lead status the contact person is or what inquiries there have been so far. And finally, the result of the conversation can be noted, if the customer possibly wants a product brochure, an offer or an appointment with another specialist as a follow-up. In the case of maintenance or service, simple checklists or forms can be used to note which points were checked, which repairs were carried out or which measurement data of the machine were entered into the app.

To support a conversation with the customer, the salesperson and sales representative can also use the app to look together with the customer into the menu of the content assets, which information from the product data sheet in the app you want to look up directly or which product brochures you want to have sent, for example. This can be done directly from the app via e-mail or sent afterwards as a print version. The management of the individual content assets is done easily directly in the app, to always be up to date. The employer or producer can update assets and play them into the app.

The entergon app can dock to the leading systems (CRM, ERP etc.) and pull or play back further data as desired. The special thing is that the interaction windows, forms, questionnaires, checklists and so on can be easily created in the backend system and executed in the frontend. Thus, one can develop and implement dialogue components with the customer for campaigns, initiatives, ad-hoc scenarios or simply permanently, without having to program. An important, not to be underestimated advantage is also that the license costs are significantly lower than with usual CRM and ERP systems. One simply gives an employee an entergon license instead of a standard CRM or ERP license. For specific tasks in the context of customer dialogue, one can thus resort to flexible and cost-attractive solutions, without having to adapt core systems and bear their licenses.

### 4.5.2   Automated Sales Bots

A recent development in B2B sales is the emergence of automated sales bots. The basic idea is that repetitive, automatable tasks are taken over by bots. The salesperson should focus more on the customer, his strategy and the conversion. Everyone should do what they do best. Machines can take over the recurring, permanent, mathematical tasks. The human focuses on thinking, understanding and pattern recognition based on different senses (also the non-digital ones). Different bot elements or apps interact to perform specific tasks. They are linked via APIs or platform services such as Zapier, IFTTT or Integromat and exchange data with each other. Possibly, the process is not yet 100% automated and still requires manual intervention at some points, but large parts can be automated.

**Fig. 4.27**   Digital Sales Bots. © Hans-Peter Neeb 2022. All Rights Reserved

Let's take as an example the bot family from Fig. 4.27. Their task is to actively and continuously generate new leads for a recruitment consultancy. They are looking for companies that have advertised open positions. The target group are the people or better decision-makers in the respective human resources department. A bot is initialized, which in step 1 continuously searches the internet (scraping) and finds certain open positions with its monitoring. If these positions match the desired profile, a trigger is triggered and the position and the company are captured, in order to reach them now on digital touch points and social networks. By means of a previous set-up, the target approach was adjusted so that the contact persons of the human resources department and in particular the human resources management or executive board human resources are in focus. The digital approach, for example with digital ads, takes place in step 5. It includes a systematic A/B testing, in order to continuously learn and optimize immediately. This can test images, texts and/or headlines. An artificial intelligence ensures new variants in the background. For example, it is already possible to create modified text or title variants with artificial intelligence, which are no longer distinguishable from manually written variants. If the direct approach meets interest and the person clicks, a chat bot opens, which provides further information, can ask questions and asks for the contact details. This creates a lead, which can be stored in the database. On this basis, a contact

is made via various possible media. In this case, we take an email approach in step 10. If successful, a salesperson can take direct contact and take over the lead processing. It is important to notice here that at the end there is a human being who takes over the conversion of the customer. This will not be possible (for now) for products or services that require explanation or consultation. It is interesting to see that capturing, processing, analyzing, exchanging data can be completely automated, which relieves the salesperson enormously. It is recognizable that these automatic bots will increasingly enter the sales universe. For further details, see Cortinovis (2021).

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# Organizational Changes for the Successful Digitization in Sales

**5**

In marketing, we have already experienced that numerous new roles and skills have been integrated into the organizations. Especially analytical and data-operational tasks have been added. A similar development can also be predicted for the sales of the future. We can assume that the sales organization will be expanded with further digital competencies in the future (Fig. 5.1). People with data and analysis skills are needed to support the core sales. Their task is to provide the salespeople with the important insights, so that they can better understand the customers and be more successful in sales. The analysis colleagues provide the insights on digital lead information, to identify and exploit new opportunities at existing or new customer level. As part of social selling, they analyze relationships with key people on the customer side and support in intensifying these relationships, by researching relevant content and providing it for the salespeople or even partly managing the social account within the defined framework. They conduct the listening analyses with and without specifications, to bring new insights to light and support the salesperson with them.

Sales support teams can be created, where either in the form of 1:n one person works for several salespeople or for important customers in the form of 1:1 each salesperson has his personal specialist at his side. The tasks are discussed, insights exchanged and inquiries investigated at regular intervals. The cooperation must be integrated and continuously organized, because these are success-critical tasks for a successful sales. In the best case, spatial proximity is advantageous. Different constellations and combinations of complementary skills are conceivable. One example can be that more and more young people with digital affinity and/or analytical experience are represented in sales support. These can be young professionals or graduates. Here, a new career path in sales or digital jobs will emerge in the future. Traditionally, sales still tend to have the "old hands", so that an ideal complement in the cooperation can result. The experienced salespeople
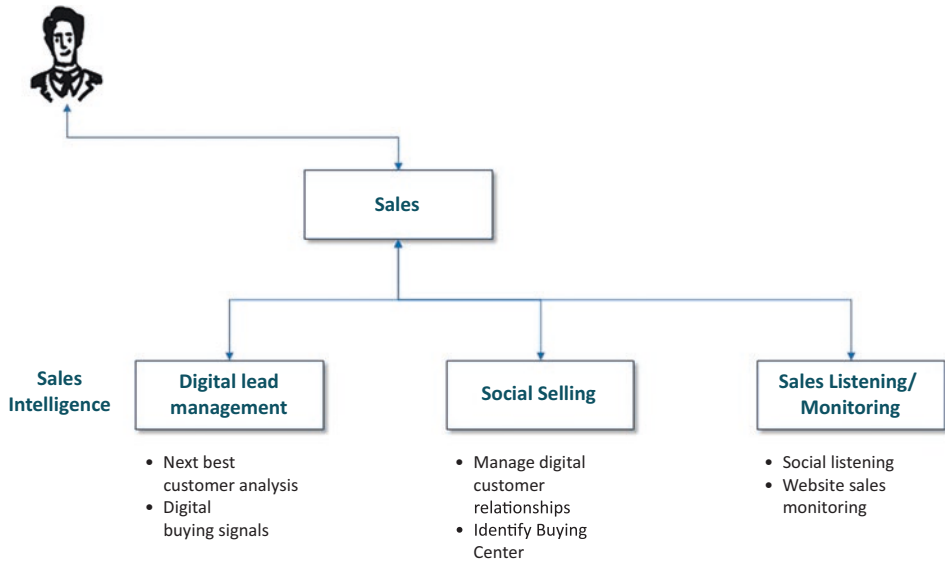
**Fig. 5.1** Organization in the future: Digitized sales. © Hans-Peter Neeb 2022. All Rights Reserved

know which information they need and how to interpret and use insights for sales. The younger colleagues in the field of sales intelligence know, for example, how to operate the tools, how to set filters sensibly and build queries, how to optimize analyses on a rolling basis and how to read results. Especially they can efficiently implement the analysis orders of the sales colleagues and come back with the appropriate results. After a while, a colleague from the sales support area can develop into the actual sales, because he had enough opportunity to think into the sales matter, to understand the customer or the industry better and to know how a salesperson performs his tasks.

When we look at the virtual sales team, including the colleagues from project management, service/maintenance and so on (Fig. 5.2), it is quickly recognizable that these colleagues at the customer interface also have a need for analyses and new insights, to successfully complete their sales tasks. As already discussed, they have important contacts to possible decision-makers, who are significant for sales. Thus, they not only have to think and act in a sales-oriented way, but also receive sales-relevant information, to better understand the customer and optimally use their own opportunities.

Especially when looking at key account management (Fig. 5.3) and sales together, one can see that both roles can have very different needs for insights about the customer. While sales may be focused on certain business areas and products used by the customer, the account manager has a view of other business areas, other regions and thus also other own competitors. In particular, the language area in account management can be much more international or even completely international. Suddenly, other skill sets, such as
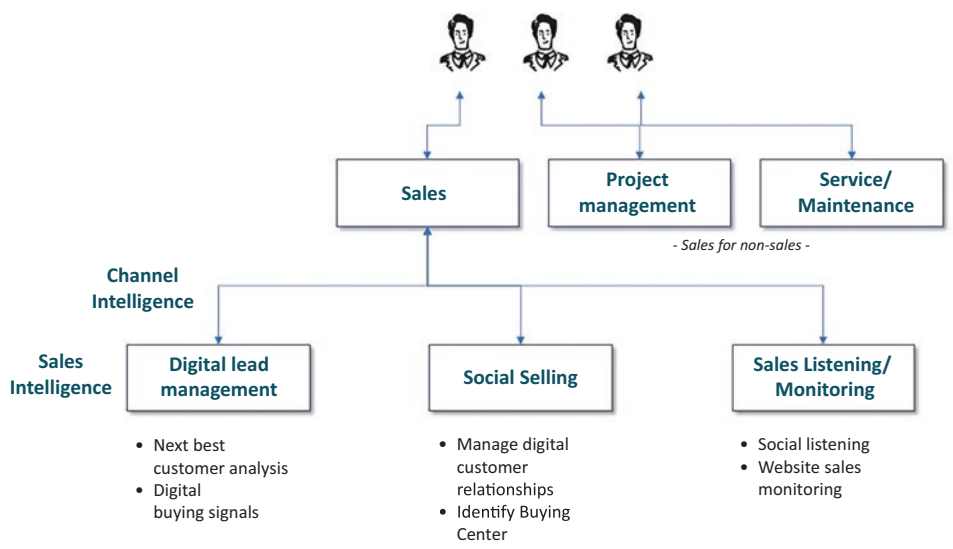
**Fig. 5.2** Organization in the future: Digitized sales including the non-sales colleagues. © Hans-Peter Neeb 2022. All Rights Reserved
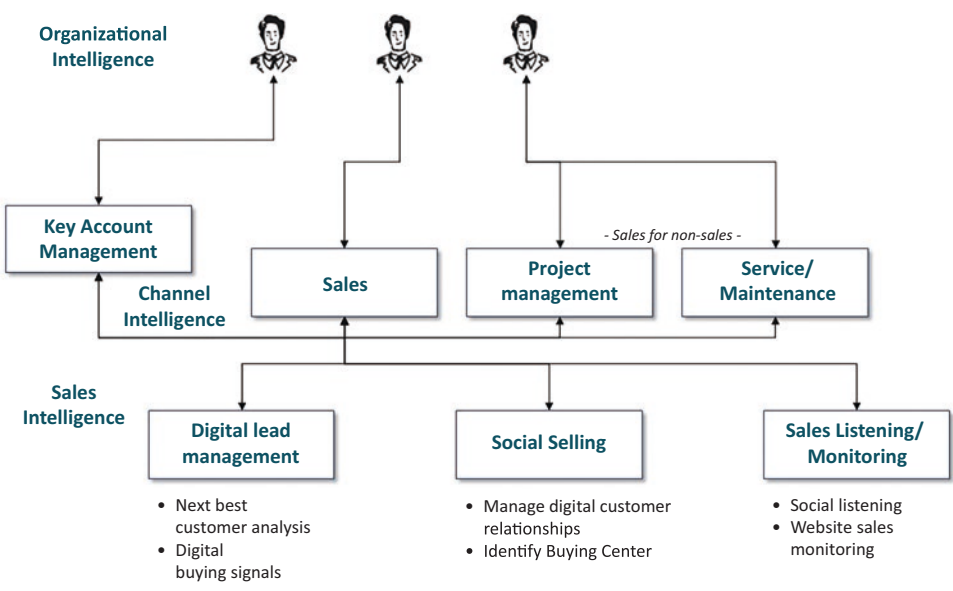


**Fig. 5.3** Organization in the future: Digitized sales including key account management. © Hans-Peter Neeb 2022. All Rights Reserved

special language skills, play a role, even if English will certainly dominate. However, some markets can be so important and large that even the mastery of the respective national languages is necessary, to really understand the market.

It can also make sense to organize the sales support team virtually and, if necessary, distribute it across the most important countries. This way, one can ensure that one has the required resources with local language on site in the essential markets, who provide the salespeople and key accounters with information. Whether the reporting lines should also be centralized or report decentrally to the local sales teams depends on the requirements and complexity. A decentralized organization is often preferable because of speed, flexibility and content quality. However, with really many resources, it can make more sense to consolidate the sales support units more centrally, in order to achieve a more efficient organization and standardized processes and to achieve a coordinated coverage in terms of topics or regions. In addition, with an overarching sales support organization, the technical equipment, the procurement of digital tools and the pooling of knowledge can be designed better and more cost-efficiently. Here, too, regular exchange formats of the support actors are needed, in which they compare results, verify connections, identify gaps and put the puzzle pieces together into overall pictures for the key accounters and salespeople. In doing so, ad-hoc requests complement regular analysis, in order to recognize temporal trends and, for example, deviations with the latter.

## 5.1   Personnel Development for Success in Sales

Various dimensions play a role for sales success. In practice, we often first look at three simple thoughts: Can, Want, Should. After that, we assess the potential and success of people in sales. Often, managers are not clear about what stage we are in, why a problem exists and which lever to use. *Can* can be achieved through qualification. It is about methodologies, tools, experience values or approaches. They are skills that I can learn. You can read books, take courses, attend workshops or ask colleagues. The AccountJourney® method and the digital tools that were presented in this book belong to this category. Skills help us to get better at what we do and how we do it. It is interesting, for example, that young employees can learn technical knowledge and methods quite quickly, as long as they are motivated. Often, the ability to understand a customer with method turns out to be more important than years of expertise in the industry. Thus, young employees can get a special value, if you look at that in relation to their salary. That is why the next dimension plays such a relevant role. Because you can learn quickly, if you want to.

But there is also a second dimension: the *Want*. What good are the best skills, if I don't want to? Here, motivation is mainly required. You have to overcome hurdles, find meaning in the activity, see a value and/or feel enthusiasm. It is very much about the emotion or feeling that you experience when you perform the activity. A special hurdle in sales is when you as a salesperson are not convinced of your own offer and see little value for the customer in it. Then you feel, for example, cold calling as difficult, annoy-

ing and unpleasant. If you understand and have experienced the value that your own offer achieves for the customer, then you have a completely different attitude and are convinced of what you do. That is why it is important to understand the cause first when there is a lack of wanting. Does a barrier have to be overcome? Or is the why missing in my activity? People want to feel a sense of meaning in what they do.

Money can be an incentive, but usually only has a positive effect on motivation in the short or medium term. You get used to money too quickly, and it does not give you a long-term sense of meaning for what you do. People want to do something meaningful and they want to feel comfortable. The underlying questions are: "Why do I get up in the morning and go to work?" And: "How does that feel in one or three years?" Some value the social environment or a sense of we. People want to feel understood, want to be appreciated and receive recognition. A lot starts with the manager. Does he or she listen to the employee? Does the employee get human attention? Are there time windows for one-on-one conversations, in which one can communicate? Is there also a personal word exchanged? Does the employee get the impression of being the most important individual in the team at that moment? Does the manager give positive feedback? Is communication not only on the head level in the world of numbers and processes, but also on the heart level? A lot of motivation can be generated by positive atmosphere and human leadership behavior. It is important that managers recognize this or that someone draws their attention to it. The motto applies: Take care of your employees, then the employees will take care of the customers.

Both dimensions are necessary to be successful (Fig. 5.4). The clueless motivated person is just as unhelpful as the experienced, frustrated stuck person. But both can



**Fig. 5.4**  Personnel matrix (assess and develop). © Hans-Peter Neeb 2022. All Rights Reserved
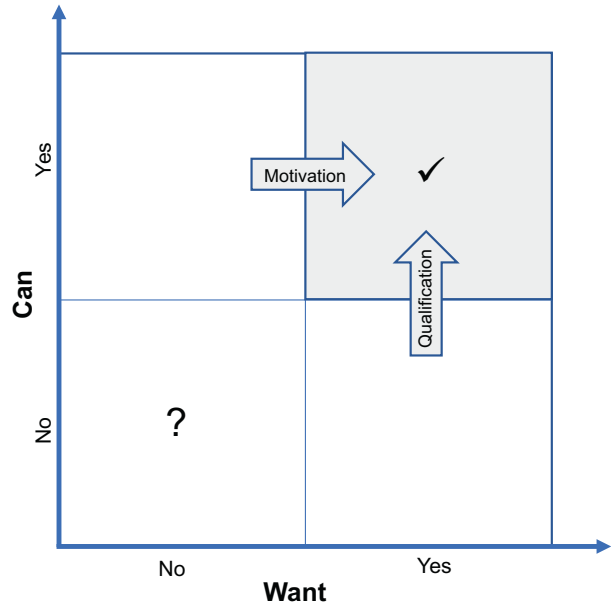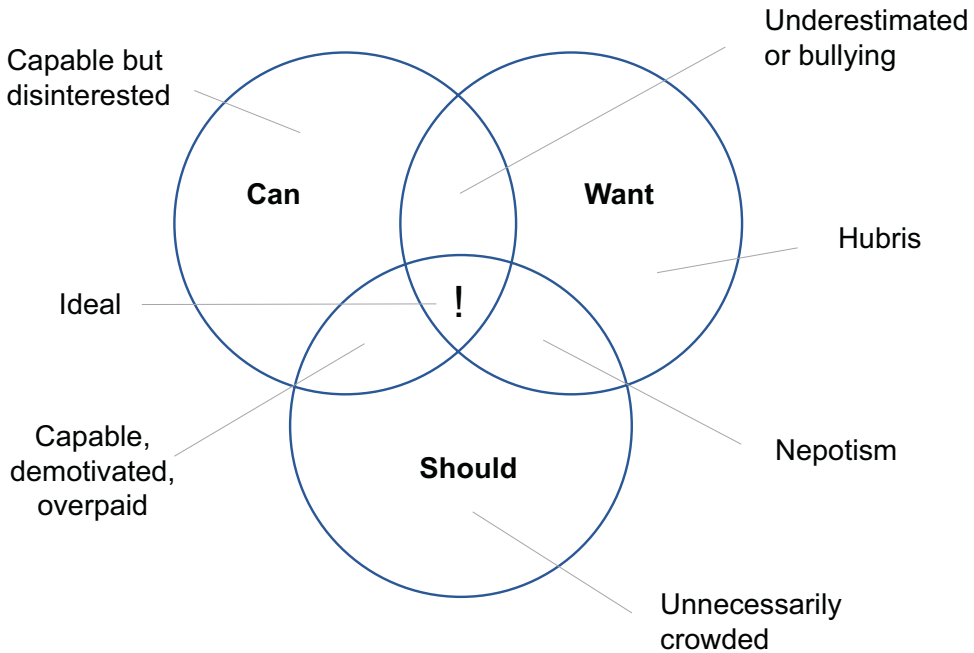
**Fig. 5.5**  Scenarios and starting points. © Hans-Peter Neeb 2022. All Rights Reserved

be helped in different ways that improve the right dimension. I think it is important to emphasize that especially inexperienced, perhaps young, people can be helped to achieve sales success with the right method, by qualifying themselves and being qualified.

Now another aspect comes into play: the *should.* Here the employer's plan plays a role. How should the person be used? What task should they get? What activity and responsibility correspond to the salary? What fits the career path? Naturally, more is expected with a higher salary. If the ability is right, they should also deliver the performance that is expected from this salary. The willingness must of course be right. In addition, life experience and age also play a role. You can usually not send a 30-year-old to a CEO of a corporate customer, even if he had the ability. The CEO would hardly perceive and accept him at eye level.

There are different constellations that offer opportunities or require appropriate measures (Fig. 5.5). The manager probably has to manage different expectations from employees. For this, it is first important to recognize which scenario prevails. With the capable person who is disinterested, one has to understand what hinders them. The capable person who is demotivated also has to be understood and find out what prevents them from unfolding their potential. Someone who should, but neither can nor wants, is unnecessarily pressured. Someone who should and wants, but cannot, is more a case of nepotism. Someone who only wants, but cannot and should not, overestimates themselves. The one who can and wants, but should not, is either undiscovered or being bullied.

## 5.2   Status and Development Paths in Sales and Digitalization

The question of where a company's sales are currently located is exciting. This means the development stage (Fig. 5.6) and the benchmark compared to other companies, within the industry, within a country or a region and so on. One can also speak of maturity levels or degrees of professionalization.

There are actually industries and companies where sales are not sales, but rather an order acceptance. Orders are accepted, checked, assigned and a delivery date is given. There may be no other acquisition activity. It is also not necessary, because the orders come in anyway. This phenomenon can occur in some monopolies, but also in oligopolies. One is, so to speak, reactive in sales. The necessary qualification focuses on the knowledge of how to accept and place an order from a customer and enter it into the system.

In the next stage, actual sales take place and often also in the form of an active field service. However, we are talking here about product sales. That means, I advertise the product: "So big, so heavy, with the following functionalities." In the best case, the benefits are also addressed in addition to the features. The message, however, is the same for every customer. This is usually the common form. We have already discussed in Sect. 2.5 why this does not help some customers and why the added value can vary greatly from customer to customer. The necessary qualification is a good knowledge of one's own product or service. It is about being able to present and explain one's own offer.

Let us therefore come to value selling as the next development stage. There are also the terms value added selling or value based selling. This is the concept that considers and focuses on the value from the customer's perspective. The necessary qualification is to understand the value for the customer. With the help of the AccountJourney® analysis, the salesperson can better understand the customer and realize what value the customer actually buys. He focuses his activities and communication on that.



| Order acceptance | Product sales | Value selling | Strategic Account Management |
|---|---|---|---|
| Reactive | Proactive | Advisory | Trusted partner | Sales maturity

**Fig. 5.6**  Development stages of sales. © Hans-Peter Neeb 2022. All Rights Reserved

In some situations, an account management or a strategic account management makes sense. In particular, we focus on significant, large, complex and regionally cross-cutting customers. They need a special care that must meet specific requirements. The account management usually works with different salespeople or even sales teams for such customers. The key accounters have the task of being responsible for the strategy for each customer and coordinating the measures.

The further development to the next stage can be learned. The step from order acceptance to product sales is essentially the step to acquisition and also to field service. Order acceptance means that you wait until the customer comes to you. Sales means that you look for the customer and approach them to present your offer. The step to value selling requires learning a methodology to understand the customer. The AccountJourney® analysis helps with this.

These stages do not always make sense. In industries that only have a *commodity product* or offer very simple transactional services, the two higher stages do not occur, because there is no need for them. There is an offer and a price, to which the customer can say yes or no. For more complex or explanatory offers, on the other hand, the two upper stages can be very pronounced. In a very competitive environment, the lower two stages will hardly or soon no longer occur, because they have been or will be completely displaced.

Both developments interlock. We always recommend to improve the sales readiness first, before dealing with digitization. It is important to do proper sales first and then examine which digital measures can further improve this sales (Fig. 5.7). If you are still
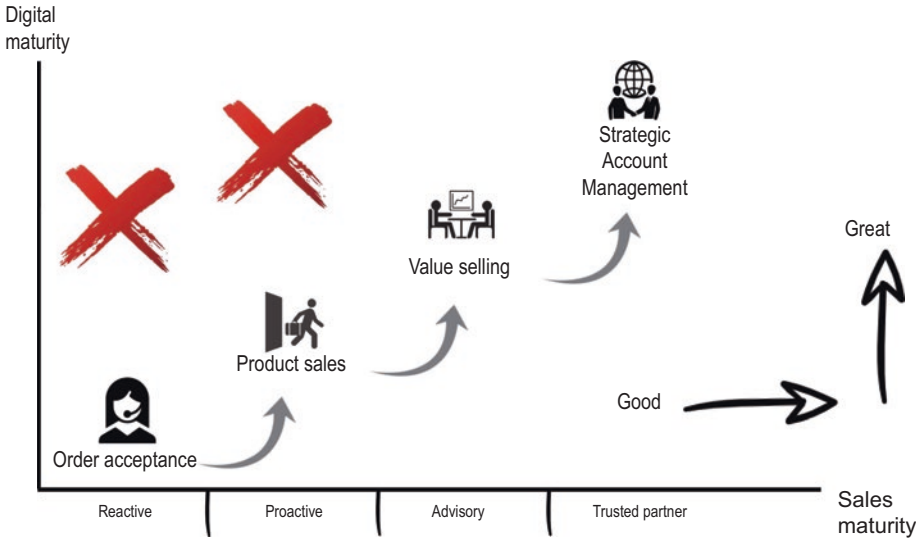


**Fig. 5.7** The interaction between sales method and digital tools. © Hans-Peter Neeb 2022. All Rights Reserved

in the stage of order entry, digital sales makes relatively little sense. If you are in the stage of product sales, you can do digital sales, but the efficiency is still relatively low. Only from the level of value selling, more digital maturity leads to significantly more effectiveness. From the development level, it is not only sensible, but also highly recommended to advance digitization. This way, you can especially expand the competitive advantage and effectively do value selling.

The digitization axis is comparable to the speed of a car and the axis of sales readiness is comparable to maintaining a consistent direction. First of all, you have to find a constant direction, before it makes sense to accelerate. Only then you get closer to the goal quickly. Otherwise, you drive with constant high speed in different directions and get only little closer to the goal. It is like with a barrel. As long as the bottom has a hole, you do not need to pour more water in from above. That is not efficient. In Fig. 5.7 we have to move first to the right and then up.

## 5.3   Sales Method and Digital Tools

We take a look at the three simplified phases of lead generation, new customer acquisition and existing customer development (Fig. 5.8). The digital tools can be very helpful especially in the area of lead generation. By intelligently using data, leads can be identified. The sales method helps to successfully convert leads into new customers and systematically develop existing customers. Of course, the digital tools also help the salesperson to win new customers better and expand existing customers. Likewise, you can also generate new leads by using the effective sales method, for example by successfully obtaining a recommendation (see Sect. 5.5) or by generating leads in sister or subsidiary companies in a larger corporation, for example.
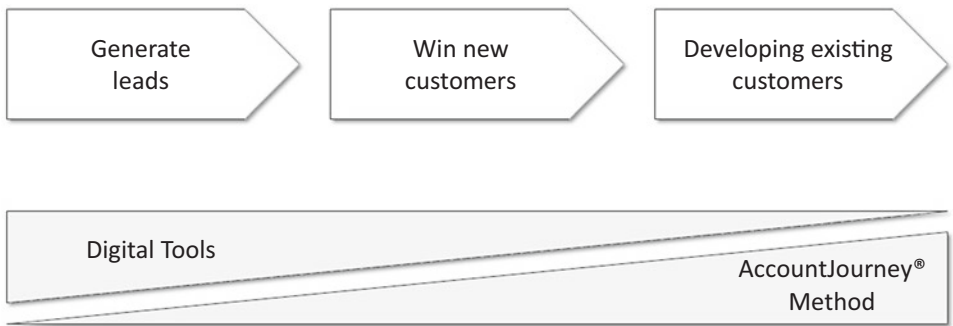


**Fig. 5.8**  Use of the digital tools. © Hans-Peter Neeb 2022. All Rights Reserved

## 5.4    Digital Tools at a Glance

### 5.4.1   Overview of Tools and Their Use

Let us take another look at the mentioned tools and their providers. As described, the different tools serve different purposes. It is always important to consider carefully what exactly is needed and where to start. Step by step, you can build up your required tools and integrate them into your own or new, improved processes. This requires an analysis of the individual circumstances of the respective organization and its requirements. The Table 5.1 gives a brief overview of what tools can be used for what purposes.

### 5.4.2   Digital Tools in Interaction

Let us now turn to another exciting question: What does an integrated landscape of digital tools look like? To anticipate it: The answer will not be comprehensive, because only some tools were presented here. Figure 5.9 shows an exemplary digital tool landscape, where the data and lead flow goes essentially from left to right to the salesperson. We see how digital listening analyzes both potential and existing customers. We can see at the bottom left how Implisense/DATAlovers generate potential leads that are look-alikes of existing customers. Echobot detects concrete leads based on sales triggers and provides suggestions of contacts based on XING and LinkedIn® information. Website visitors are captured at the top by Leading Reports and Wired Minds and possible contacts are deter-

**Table 5.1**   Overview table of tools and use

| No. | Task | Tool |
|---|---|---|
| 1 | The next best customer (Look-alike models) | Implisense / B2B Smart Data / DATAlovers |
| 2 | Recognize buying signals (Digital Lead Generation) | echobot |
| 3 | Identify needs and time windows (Understand website visitors) | LEADINGREPORTS |
| 4 | Recognize and visualize referral bridges | PALTURAI / AXON INSIGHT |
| 5 | Digital Listening | VICO Ubermetrics |

**Fig. 5.9** Digital tool landscape. © Hans-Peter Neeb 2022. All Rights Reserved

mined by XING or LinkedIn®. Palturai or Axon Insights help to find and use personally known referral bridges to reach decision-makers more easily. The leads are reviewed and possibly processed by the sales team or salesperson. The data flows into the CRM, where the status of the lead is further tracked. Based on this existing customer information, for example, qymatix can make various sales predictions to develop the customer more successfully. Helpful are tools, such as the sales app from entergon, to conduct the conversation with the customer easily and smoothly.

The illustration in Fig. 5.9 is not meant to say that one should set everything up like this in the first step, but that a possible target picture can look like this. Here, the connections should become visible in particular. As already mentioned above, it is important to think about where to start and what the target picture should look like. Then the implementation is done step by step. It is important to measure, celebrate and improve successes after each step. Only in this way one gets the acceptance of the employees for the change and only in this way one keeps the momentum. The map will look different for each company. The respective requirements and goals set the direction for this.

## 5.5   Referral Networks for Sales

The dream of every salesperson is to produce a predictable stream of desired leads. There are different approaches to achieve this. One way that is often overlooked due to lack of experience is the approach of getting suitable leads through targeted referrals. A method that is already more pronounced in the USA than in Europe, but is also leading to more

"I know someone who has a need for your solution and needs you."

Solution

Recommender

"Why don't you talk to each other and see if it can fit?"

"I understand you have a need and I can recommend someone."
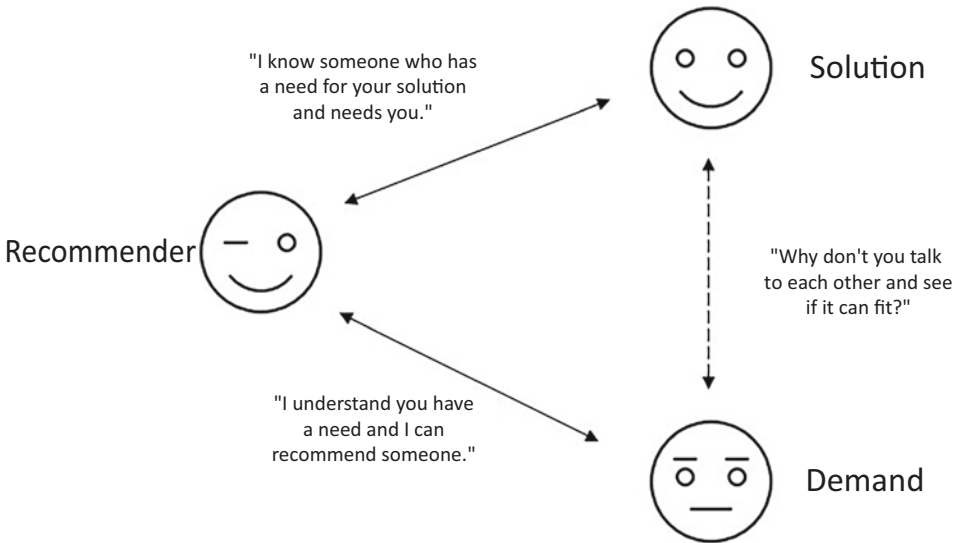
Demand

**Fig. 5.10**  Referrers. © Hans-Peter Neeb 2022. All Rights Reserved

experience here. The idea is very simple. The communication that I send to customers, I direct to multipliers or better referral givers or referrers (Fig. 5.10). Other people in the B2B sector also have direct contact with our target group. They are in completely different industries or business segments and thus no direct competition for us. But they also talk to the decision-makers who have relevance for us, only about other topics. They may already have a good relationship with a company that is on our target list.

If one of these multipliers now has contact with my target group and has a good relationship with a person who has a concrete need for my solution, then there is the opportunity for him to become active as a referrer. He does this to do the person with the need a favor. He can only do this if he has a good relationship with this person. But he only does it if he also has a good relationship with me and he is convinced of me and my solution. We will come back to these prerequisites in a moment. If he now wants to give the referral, he can ask the person if he should establish a contact for them to someone who has a suitable solution. If the person agrees, then the person with the solution is contacted and asked to contact the person with the need as soon as possible, because they have already been notified. Thus, it is no longer a cold contact, because the contact was prepared and the contact agreed. One only has to make an appointment to get into a concrete conversation. Thus, it is easy to build a relationship with people who one did not know before.

Such recommendation bridges shorten the process enormously. The goal is that when you call, you no longer have to explain who you are and why you are calling, but only look together in the calendar for a suitable appointment. This is usually a short phone call, because you have already been recommended by a trusted person and announced.

Thus, it is clear that there is a need, there is a possible solution and you can trust the calling person for the time being. Everything else will be clarified in the personal appointment. But this is an incredible advantage and a huge leap, if you are recommended by a trusted person. It saves everyone time and effort. Whether the solution is the right one, you clarify together. But you are in conversation in a simple way.

However, there are also some prerequisites and some preparatory strategic steps to master. First, it is important to be clear about which target person you have and which target segment you are looking for exactly. Here, a very sharp formulation is necessary, so that the recommendation method can work successfully in practice. Instead of just saying "all medium-sized companies", a successful example can be "all craft businesses with more than ten employees, who are looking for employees". Some are afraid of losing bandwidth by being too specific. In truth, general, unspecific formulations have hardly any chance of success. A sharper target search compensates for the lower potential by a disproportionate probability of hitting. This is due to the associative thinking of humans. We need formulations that create images or patterns in the head, in order to be able to remember them in the right situation. A general search profile is forgotten a few minutes later. Specific search corridors can stay in the memory for months. It is better to develop two or three specific search profiles, which you communicate selectively.

Furthermore, it is important to also give some trigger points, which can be easily recognized, in order to suspect a need and then ask specifically. In the personnel example, these can be statements like "We have a staff shortage", "We have delivery delays" or "I can't accept any more projects." These are signals that can be easily recognized and where you can ask about the cause, in order to possibly discover the need for more employees and establish the contact to someone who can find new employees, for example, through social media strategies.

Now, however, it is crucial that you set up these search strategies systematically. First, it is important to define the right multipliers (Fig. 5.11). They must be partners who have direct access to the desired decision-makers. In the example, these can be lawyers, tax consultants, craft suppliers, industry software providers and so on, who have direct access to the owner and are thus in the same target market. Here you should pick out about five to ten multipliers and ask for a conversation, in which you explain the procedure and the benefit, that you can mutually bring each other into business in the target market. If this is understood by the partner, you have to train each other and explain exactly who you are looking for, what need you can cover, what you do, why you are particularly good and which keywords can indicate a need. This means systematic work, regular conversations and mutual tapping of existing contacts. This way you can systematically open up a target market.

The goal should be the development of a long-term, predictable referral business through a sustainable network. The more systematic you proceed the approach, the more likely you can scale the procedure cleanly. You rely on a reliable, extended, virtual sales team, with which you work together, intensify your relationships and exchange recommendations.
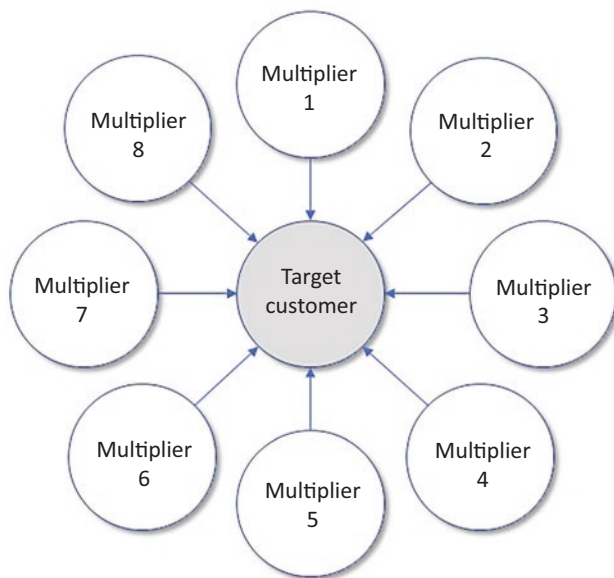
**Fig. 5.11**  Multiplier/Referrer. © Hans-Peter Neeb 2022. All Rights Reserved

Let's look at some comprehensible examples from practice. We use experience values from networks like Business Network International (BNI; bni.de) or Corporate Connections (CC) and the methodology Asentiv (EO Empfehlungsoffensive GmbH, 2018).

**Examples**

Let us look at a company with 40 employees and 60 million euros in sales, which distributes medical products. A core product are X-ray machines for medical practices. Its multipliers are companies or entrepreneurs who are in business contact with medical practices. These include, for example, tax consultants for health and care professions, advertising material producers for doctors, the German Pharmacists and Doctors Bank and so on. In this circle of referrers, the conversations take place to raise awareness of the need, the solution and the trigger points. For example, if one notices in conversations with doctors that there is a possible need for X-ray machines, one can establish direct contact with the solution provider. This also strengthens one's own relationship, because one trusts the provider and has had good experiences with him.

An example from the industrial sector is a scaffolding manufacturer for production plants, to avoid interrupting the operational processes during conversion and repair measures. Special enclosures are carried out to prevent the machines from being contaminated and to keep them running. The solutions are relatively unknown and therefore they do not occur in the minds of production and manufacturing managers. The

responsible persons have to be given the hint and tip that there are such possibilities, so that the production does not have to stop. The companies can save hundreds of thousands of euros and solve a real problem. They just have to find out about it at the right moment. The referrer knows this and can point it out to his customer, to do him a favor. He can establish the contact to the solution provider and thus strengthen both relationships. One needs multipliers, whose target groups are also producing companies and with whom one speaks best either with the production management or the top management. The better I train my referral network, the better the individual partners can help their customers with my suitable solutions. ◄

Important for the referrer is to obtain feedback afterwards, whether the hint was helpful. This way one learns and gets a better understanding of when a solution fits which needs and that the recommended one is also as trustworthy as one knows him so far. This intensifies the relationship networks and supports the methodology. Markets are complex and intransparent and real information procurement is not easy. Through personal recommendations, one can overcome such hurdles more easily. The system is also self-regulating. If the recommended one does not deliver the desired performance, the referrer gets this communicated by his own business partner and can ask. Possibly this is true or it clears up or one comes to the conclusion that the recommended one is not the suitable partner for certain situations or also in general. The approach is self-learning and optimizes itself, if the participants make an effort.

## References

Asentiv Deutschland. (Hrsg.). (2018). *Ein Raum voller Empfehlungen: Und wie du diese durch richtiges Netzwerken bekommst!* EO Empfehlungsoffensive GmbH.

# Final Remark

In order to be more successful as a salesperson and key account manager, experience shows that a decisive prerequisite is that they change their perspective and think from the customer's point of view. It is about understanding the actual added value that is defined by the customer. Thus, the salesperson no longer has to sell, because he makes it easier for the customer to buy. The Account Journey® analysis is a suitable and practically applicable process to understand the customer correctly. In addition, digital tools help to obtain better insights, identify opportunities or improve sales approaches.

I hope that with this book I have made a positive contribution to this, and I wish all salespeople, key accounters and top managers in sales and key account management much success and joy in the practical application. If you are interested in updated information or corrections to the content of this book, you can find them at www.Account-Journey.de.