Optimizing The Sales Discovery Process

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Sales in Crisis

Sales productivity has steadily declined over the past ten+ years, and is now at a critical low. Many sales professionals are working much harder to reach the same levels of performance, many are not hitting quotas, morale is declining and turnover is rising as a result. The report, "The Sales Productivity Crisis," provides more background on the challenges.

The way companies think about customers and ongoing relationships have changed, partially because many businesses are selling some or all of their products and services in a subscription model. Businesses have moved to a point now, where building and maintaining relationships with customers is a core part of a successful go to market strategy. This is intensified in a business model based on subscription / recurring revenue, where renewals matter as much as new business.

There are significant changes in the way buyers research and buy products as well. Customers and prospects look for providers that focus on outcomes and not on transactions. In other words, the successful sales rep must develop a real understanding of the customer and their business challenges. Gaining understanding though, is not easy and is not in the core skills of many reps today. In addition most sales tech is not aligned to support the rep in the process of gaining an insider's view of the prospect.

Gaining Understanding

Examine any modern sales process and you will find some version of "qualifying the lead" to start the first stage. The term "qualification" does sound like an established process, unfortunately in most companies the term has several meanings depending on the audience. A marketing qualified lead is not the same as a sales qualified lead nor are either a product qualified lead. For a sales qualified lead the goal of course, is to turn that lead into an opportunity. Underneath qualification, and really underpinning the whole sales process, is discovery. Discovery is the process of gaining understanding. Unfortunately few sales teams have a structured discovery process

Only 13% of customers believe that salespeople understand their needs.

The Brevet Group - Nov 2020


An Insider's Point of View

Focusing on quotas, fiscal quarters and "closing the deal" leads to a transactional culture, not one of building strong, ongoing relationships with customers. The shotgun approach to prospecting was never particularly effective, but with the level of access control afforded prospects by technology, it is easier than ever to ignore unwelcome and irrelevant sales outreach. Customer expectations have changed. It's no longer enough for sales reps to reach out with generic offerings and messaging. To gain attention and create interest, sales reps need to create real value in each customer interaction — and the way to do that is to help the customer think about their needs more holistically.

A structured discovery process then, is critical for your sales reps to become relevant and earn the prospect's trust. Only through deep understanding can you provide outcome-based offerings that are targeted at the customer's specific business problem(s).

One common misunderstanding is to think of discovery as a specific stage in a sales process. Discovery is the critical underpinning of *every* stage of a sales process. A sales rep needs to learn new information in every customer interaction. It's very difficult to win a deal as an outsider looking in. It's the sales rep who has achieved insider status that wins nearly every deal. So discovery is also a race: The rep who creates the most value gets more and more of the customer's time and attention, and that's the point in time when competing reps get less and less.

The discovery process is really a series of questions that need to be answered to get to the level of understanding a rep needs to help the customer achieve its desired outcome. The questions sales reps need to ask varies greatly by a number of factors like prospect role, industry, business challenges, and your specific solution(s). The permutations are nearly endless based on the large number of variables. The questions also evolve over the life of the conversation as you learn more. If all this sounds complex, it is. Managing the discovery activity, asking the "right" questions at the right time, and even knowing which questions to ask, and when, is dynamic and in need of a systematic, yet flexible approach.

Effectively managing this level of complexity is very difficult using manual processes and is outside the capabilities of most sales tech. An example is probably useful in understanding just how complex this could be.
Assume that a company has:

- 6 products
- 4 use cases for each product
- A sales process with 7 stages
- 4 target buyer personas
- 9 critical data points for each sales stage

From a discovery perspective that leads to 6,048 total potential questions. Erring on the conservative side, assume that there's 25-30% overlap in the questions from opportunity to opportunity, making the potential number of questions between 4,536 – 4,234. Could that process be addressed by training the reps in both the process of discovery and in the necessary questions? According to a Xerox study, 87% of what is learned in sales training is forgotten in 12 weeks. It *is* possible to learn and develop the soft skills required to do discovery *but* learning to manage the discovery questions and answers manually is not something the human brain was designed to do well. This explains the "Only 13% of customers believe that sales reps understand their needs" finding from the Brevet Group study.

Aiding the Discovery Process

Fortunately, managing a Rubik's cube amount of discovery data is exactly what computers do well. There is a lot of sales tech available, unfortunately though, very few of the offerings are focused on discovery and the need for a systematic way to execute the process. There are a few modern sales acceleration platforms though, that offer structured, collaborative discovery functionality. For sales acceleration tools to be effective, they need to include:

- Customizable question sets that are tied to specific products, use cases, personas and sales stages.
- A question engine that dynamically changes the questions to match the specifics of the opportunity.
- Collaboration capabilities to facilitate sales coaching, monitoring and input from managers and sales product engineers. It would be extremely useful to extend that collaboration capability to prospects as well.
- Functionality to track all the answer data collected and the progress on the discovery process itself.
- Artificial intelligence (AI) to monitor, improve and optimize the question sets across the entire sales team, learning continuously from each customer interaction.

It goes without saying that the tool must support any device from desktop to mobile device. One of the biggest differentiators with this feature set is the addition of AI. Consistently improving the sales team's performance is critical and the AI insights and automation greatly enhance this ongoing team productivity growth and effectiveness. For more information on the impact of sales acceleration technology on revenue performance see the report "Accelerating Revenue with Sales Technology".