



Book

## Dealstorming

The Secret Weapon That Can Solve Your Toughest Sales Challenges

Tim Sanders  
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“Dealstorm” your way to sales success by building the right team and deploying it strategically.

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## Recommendation

Today, only 40% of sales representatives meet their quotas. Coming to the rescue, sales veteran Tim Sanders outlines a direct approach to overcoming hurdles in large business-to-business sales. He presents his seven-step “dealstorming” process in clear chapters filled with explanatory anecdotes. The process of dealstorming requires assembling a focused team from across your company’s departments. Sanders positions dealstorming as the best method for closing stalled sales. He illustrates his system with diagrams and illuminates each step with case studies drawn from his sales leadership experience. Dealstorming offers an intriguing approach to overcoming sales problems strategically. *getAbstract* recommends this solid guide to B2B sales reps and managers looking to overcome that nagging, lagging sale.

## In this summary, you will learn

- How “dealstorming” breaks through sales obstacles
- How to organize a business-to-business “dealstorm” team
- How to manage the dealstorm process from beginning to end

## Take-Aways

- “Dealstorming” is a focused approach that uses a cross-department team to move a stalled business-to-business sale forward.
- With 40% of sales reps unable to meet their quotas, making sales is harder than ever.
- Today, most deals face several challenges: multiple decision makers, complex technology systems and an influx of information that complicates clients’ expectations.
- The seven major steps of the dealstorming process are “qualify, organize, prepare, convene, execute, analyze” and “report.”
- A sale moves through four stages: “contact, conceive, convince and contract.”
- The size of a “dealstorm” team depends on the “value” and “difficulty” of the sale.

- The team has a “problem owner, sponsor, resources” and “information master.”
- To help your team embrace different ways of thinking, suggest personas for members to adopt, such as “the hacker, the chef and the artist.”
- You might stop a deal for four reasons: It’s a “bad fit,” you lack a unique offer, chasing the deal is a waste of time or continued contact might damage your client relationship.
- Moving a deal forward requires the leader to “confirm, verify” and “implement.”

## Summary

*“Dealstorming is a repeatable process that brings a collection of minds together around a sales challenge to move it forward.”*

### “Dealstorming”

Despite a sales representative’s best efforts, a potential deal can hit a roadblock that prevents it from coming to a successful conclusion. One cure is dealstorming, a collaborative-based approach to business-to-business (B2B) selling. In dealstorming, a cross-department team follows a step-by-step, “linear process requiring discipline”

Brainstorming produces a lot of ideas, but unlike dealstorming it lacks a deliberative process for determining if the ideas are viable. Dealstorming brings people together from a company’s different units to find creative, practical solutions to a blocked sale. The participants in a dealstorm session share the same sales goal and can offer suggestions for advancing the sales process. A dealstorm requires a major investment of time and resources, so companies should turn to this tactic only when other B2B sales options don’t work.

### Why Dealstorming Works

The dealstorm helps people who don’t usually deal with selling develop a stake in a sale’s success. A salesperson may not be able to find the hidden key to success, but a team probably can. A dealstorm often discovers a sales innovation that other sales teams can use in similar situations.

*“We should take advantage of the collective intelligence of our co-workers to figure out how to get the must-do deal done.”*

Today, the B2B sales process is far more difficult than it was. Previously, most sales depended on one client decision maker. Today, most purchases require agreement from many people at varying levels of a customer’s firm. Most enterprise sales now involve five client decision makers. Completing a deal often requires navigating a client’s internal blockades. A company’s policies may complicate sales negotiations. Resistance from other departments in the client firm can make it harder to meet prospects’ requests or needs. Concluding a sale requires solving these issues.

Information technology enables prospective buyers to gather their own knowledge about your industry’s available products and about your competitors. Clients research prices before speaking to your salespeople. Many prospects already know what they want and what they think it should cost. Yet, the abundance of knowledge now available also can help in your sales planning. For example, purchasing trends reveal valuable data about what your prospects need from you.

*“To really excel with dealstorming, you need to build a team around high-value sales opportunities while at the same time managing the human dynamics.”*

### “Four Levels of Each Sale”

Each B2B sale moves through four stages: “contact, conceive, convince and contract.” Contact is the stage of meeting and networking with people at the prospect company. Determine whether each contact person from the client company can help by learning about his or her “credibility, connections, company

intelligence and motivation.” Identify the initial decision maker you want to reach. Listen to what prospects say about their business’s strengths and weaknesses, learn from them, and target your approach accordingly.

*“Inspire ongoing loyalty by being transparent about your business goals and vision for the group.”*

Conception, the second step, requires understanding your product and the problems your prospects seek to solve. Create a sales pitch that matches your product with the solution they need. The third step, convincing, begins with explaining how your product solves their problem. Your product must resolve their problem and offer a high return in terms of the client’s time, procedures and deliverables. However, most prospects are wary of innovative products, so you may need to identify factors that could persuade clients to make a commitment. Other teams from various departments (accounting, IT, legal) in your firm and in the client company may insert themselves in the sales process. Your persuasiveness during the convincing stage may not influence these other decision makers. Use dealstorming to find solutions that counteract their negativity or that manage a change of staff or a takeover.

### **When to Stop a Sale**

The sales manager and the dealstorm team should be aware of the problems a rep is facing when a potential sale seems to be breaking down. Unless the team can find quick solutions, reps must stop pitching the client. Managers should halt the sales process if one of four situations applies:

*Sales “competence is a combination of product, prospect and process knowledge, and core skills, such as communication, financial, technical and interpersonal.”*

1. **Bad fit** – The prospect doesn’t see an alignment and requests no further contact.
2. **No unique offer** – If your product doesn’t offer valuable differentiation, convincing prospects is hard. Multiple meetings make no progress; nothing indicates a positive shift.
3. **Waste of time** – Sometimes a sales manager must intervene when a rep doesn’t see that continued effort on a stubborn account detracts from moving forward on other sales.
4. **Potential damage** – Withdraw immediately if continued contact might undermine the client relationship or other relationships between the two businesses.

### **The Dealstorm Team**

The size of a dealstorm team depends on the “value” and “difficulty” of the sale. Grade the deal’s value on a scale of one to ten by levels of revenue, brand presence and “market penetration.” Grade the deal’s difficulty on the same scale, based on the challenges the sale faces on a personal level, the number of decision makers, the internal obstacles, and so forth. The number of steps to completing the sale indicates how many challenges you’ll face.

*“Act on facts; research hunches. It’s very easy for the discussion to move toward gut instincts, rules of thumb and anecdotal experiences. Without this rule, the debate often ends up with ‘trust me’ as the trump card.”*

Multiply the two scores to get a “resource” score to dictate your team’s optimal size. For example, a value of seven and a difficulty of five equal a resource score of 35. Scores up to 30 call for a two- or three-person dealstorm team, including a sales rep and manager. A score of 30 to 49 requires a four- to five-person team. A score of 50 to 69 requires a team of six to nine people, and anything more than 70 demands a 10 to 12-person dealstorm team. Participants in a dealstorm team serve in one of four roles:

1. **“Problem owner”** – This is usually the sales rep who identified the challenge and asked for help. The problem owner leads the team by identifying potential members (including recruits to fill the other three roles), producing pre- and post-meeting notes, overseeing meetings, verifying information and ideas, and determining action steps.
2. **“Sponsor”** – This is usually the sales manager who supports the problem owner throughout the decision-making process and then supports the dealstorm inside various units in the company. The manager’s position of

*“Dealstorming not only delivers sales results and*

*improved delivery later; it's a learning platform for every person who participates in the process."*

*"Collaboration experts recommend periodically infusing new members into the group to revitalize it and spur new thinking."*

*"Consensus isn't about everyone loving the idea but instead making sure that everyone can live with it later."*

*"Sometimes, your failed attempt gave you much better insights as to the root cause of your deal problem or what the prospect really needs to see, hear or feel."*

authority helps employees in other sectors understand the value of the dealstorm.

3. **"Resources"** – Everyone on the dealstorm team provides specialized knowledge about the client or the sale within specific fields. Members of tech departments, R&D or marketing can offer innovative thinking about a prospect's concerns. To recruit resource people, explain the dealstorm and how it relates to your firm's overall success.
4. **"Information master"**– The team member who takes this role will record, organize and report the information produced in dealstorm meetings.

### **Role Play**

To break through creative roadblocks and habitual thinking, team members can assume different role-playing personalities during discussions. Three different characters can help teams break through to new ideas. The "hacker" observes the problem from various angles to find points of weakness where opportunities exist. A hacker could overcome resistance to a sales call by using social media to engage the prospect. Liking and commenting authentically on a prospect's posts on LinkedIn and other sites can build relationships and improve sales outcomes.

The "chef" persona mixes and matches ingredients to produce a successful dish. Think about what you already know about the situation – review your notes, contacts, information, prospect needs and problems – and compare that list with the ingredients your product offers the client. Help your firm's departments provide other ingredients. The "artist" persona uses a "show me, don't tell me" approach. Sometimes a "visually-based analogy" can clarify an offer. For example, a real estate agency had trouble renting beautiful office spaces until an agent compared the spaces to cars: Getting a cargo van is cheaper, but doesn't make the statement of a BMW X5 SUV.

### **Dealstorm's Seven Steps**

The dealstorm starts when the sales rep identifies a sales opportunity or problem and requests assistance. The seven major steps for an effective dealstorm are:

1. **"Qualify"**– The sales manager decides a sales challenge needs a dealstorm team after the sales team has tried all other sales support options.
2. **"Organize"** – Assess what knowledge and skills you need. Recruit from across the company to assemble your dealstorm team.
3. **"Prepare"**– The dealstorm owner manages all preparatory materials, including a pre-meeting "deal brief" containing all relevant information on the client and the challenge.
4. **"Convene"**– Hold dealstorm meetings to initiate the process. "Regroup" to review progress or handle problems. Offer an agenda to focus the participants, guidelines that explain the process, time to discuss the problem, opportunities to suggest solutions and a review of "action items."
5. **"Execute"** – Every meeting requires follow-up action even if it doesn't yet involve engaging the client. To keep the sale moving, identify upcoming action steps and remind participants of their roles. The group outlines solutions, but the problem owner – with the sponsor's guidance – decides how to proceed. Have a backup solution ready.
6. **"Analyze"** – After every interaction with the client, analyze the dealstorm solution. In future sales, identify how to re-create the dealstorm's success or avoid its failures.
7. **"Report"**– Take notes on clients' body language and feedback to report back to the team. Even when the solution is in effect, keep the team aware of ongoing successes. This ensures up-to-date readiness if members need to step in again. When problems arise, resolve each situation before announcing a new problem.

*“Give praise to the team for the solution, but be careful not to attribute the ideas to individuals.”*

*“There is no lone genius in sales. No individual account executive or sales manager makes the big deal or saves the strategic account.”*

*“One team, one company’ needs to become a consistent part of the conversation at work.”*

### **Successful Dealstorm Meetings**

Keep meetings lighthearted. Reinforce the team’s focus with a clear, simple, two-to-three page deal brief for review before the meeting. An initial dealstorm meeting will take one or two hours; plan accordingly and don’t go long. To give people a chance to chat, ask team members to gather 10 minutes before the official start time. The problem owner facilitates the meetings. Facilitators need “listening skills, protectiveness and assertiveness” to maintain focus and momentum. The facilitator must listen to every idea to ascertain its potential contribution. When company policies present roadblocks, the facilitator should remain neutral rather than trying to reinforce the rules.

### **The “Collaborative Idea”**

A group gathered from different divisions of a company is likely to include people with differing styles and approaches. Pixar Animation president Ed Catmull believes that a new idea sometimes arrives as an “ugly baby,” but that time and consideration can help it become what you need. Manage participation so everyone gets to share recommendations and insights. Successfully executing a collaborative idea that emerges from a dealstorm meeting takes a three-step process:

1. **“Confirm what was decided and agreed upon”** – Shortly after the meeting, the problem owner should send individual emails thanking each participant, following up on deliverables and forwarding notes. Keeping everyone on point prevents future confusion.
2. **“Verify the assumptions and claims about key issues”** – Check facts and research the stories participants tell or the “hunches” they express. Recognize and prepare for potential drawbacks, challenges and difficulties.
3. **“Implement the winning ideas methodically”** – Report the meeting’s decisions, and create a timeline for the sale. Use a “test-iterate-launch approach” to evaluate the solution. If relevant, build a prototype as a visual representation to help everyone understand the solution, or conduct a test run to highlight any potential errors.

Dealstorm success stems from each team member’s careful planning and thoughtful participation. The sales rep leads the process with the sales manager’s guidance and support. The resource people provide information, generate ideas and offer feedback. No major sale ever occurs through one person’s efforts alone; sales success is the product of everyone’s cumulative effort.

## About the Author

Former Yahoo chief solutions officer **Tim Sanders** co-founded the research group Deeper Media Inc. and also wrote *Love Is the Killer App*, *Today We Are Rich* and *The Likeability Factor*.

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