

Starting to understand the client's side of the equation

Many professional services are sold to organizations rather than to individuals. When you sell to an organization, you need to figure out how to best engage with all the people you need to address. Talking with all the right people in the right way at the right time can be critical to your success and your client's success.

During the business development process, your goal is to help people in your client's organization find a way to act in the organization's interest. We'll assume for this discussion that working with you is what they should be doing.

Some people can easily see the value of what you plan to do. These are probably the people you think of as "the client"; they see that working with you would bring great benefit. They may have even sought you out based on this belief.

Unfortunately, other people get their hands into the action before a deal is struck. Your strategy must lead enough of the right people to decide that working with you makes sense -- so they will override objections from the others or help you bring the others on board. To succeed, you combine good arguments, flexibility to adjust to what an emerging coalition needs, and political savvy.

In [The New Strategic Selling](#), Heiman and Sanchez outline four types of people they say are part of most complex sales, and their list is a good starting point:

- **The technical buyer** is the person who specifies what the organization is looking for. This person might be your client, or it might be someone in the purchasing/procurement department or someone else. Ideally, it is your client.
- **The users** are those who expect to benefit directly from your work. If you do the work, you'll probably work with some of them to design and/or deliver your professional services, and they'll have some influence over who is chosen. Users for professional services will usually include your client. Other users might include, for example, people who will use a system or a new building or people who will participate in training.
- **The economic buyer** writes the check for the project. Expect this person to want to know exactly how the project improves the company's financial performance.
- **The coach** is someone on the inside who is helping you figure out how to succeed with the client organization. Coaches are very nice to have.



In addition to these characters, other important players include:

- **Fans of other potential professionals.** Capable incumbents have friends. Other competitors have friends inside too.
- **Foes of other potential professionals.** Based on their own experience at the company (or at a previous company), some people within the organization may dislike some of the competition; these people may support you in order to oppose the people they don't like.
- **Your enemies.** Some people may be predisposed not to like you. They may have had negative experiences with you at this organization or elsewhere. Or they may not like you because you are closely linked to someone else, e.g., their boss. Internal foes must be addressed or they'll get in your way.
- **Political foes of your client.** Hard as it may be to believe, not everyone wants your client to visibly succeed. Foes of your client may work to undermine something good.
- **Potential political or economic losers.** This is a broader category than just political foes. Some people may be adversely affected by your project (e.g., lose their jobs, get less desirable work); they may try to block your efforts. These people are often the fans of a formidable competitor, which is "to do nothing."

Some of these people will be in the formal organization involved in the decision. Others will be in the informal organization --the network of people within the company who are interested in the decision because they will be somehow affected by it.

To successfully develop business, you need a map of all these players and a strategy for each. Your strategy defines the right way to approach each relevant person and the right sequence. If you just work with your prospective client and/or submit a proposal according to their RFP process, you will likely fare very poorly.

Something to try this week

Think about your most important current client development opportunity. Who else in the client organization might be involved in decisions about that project? Which of these people might it be good to talk with (and in particular to listen to!!)? What's the best way to open up some of those discussions?

What are these tips?

These monthly tips help professionals create more business and enjoy their work more. We focus on how to start relationships, how to build relationships, and how to convert those relationships into sales.