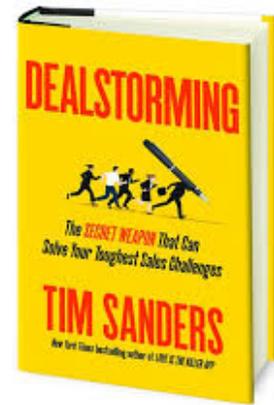


Ever wondered what to do when a big deal starts to feel shaky? Ever worried about how to keep an important client who was being courted by the competition?

If so, check out my recent interview with Tim Sanders, bestselling author of *Love is a Killer App* -- and now *Dealstorming*. This book is all about how to get how to get important deals unstuck. I think you'll learn a lot from our conversation.



In *Dealstorming*, Tim shares some of the freshest sales strategies that I've seen in a long, long time. I get dozens of sales books every year, and this is the one really caught my attention.

Listen to the [full audio recording](#).

Jill: Hello Tim, thanks so much for being here today.

Tim: Absolutely, Jill. My pleasure.

Jill: I would like to get right into this talk about dealstorming, which is the title of your new book and a new term that is not common in the sales lexicon. Can you just define it so people know what we're talking about?

Tim: Absolutely. Dealstorming is when you, as an Account Executive, put together a solution team that involves everyone who has a stake in the outcome (or expertise about your problem when you're stuck in a sales challenge.) You could be stuck at trying to get a new piece of business or trying to renew an account, but what dealstorming does is combines the freewheeling style of brainstorming with the process style of deal-making. It helps you, as the Account Executive, determine the next best play.

Jill: The next best play, so you use it when you're stuck? That's the primary use of dealstorming?

Tim: Yeah, because in our sales lives, we get stuck a lot. We get stuck on a piece of new business somewhere in the process at the front door when trying to make contact.

We get stuck trying to create that win-win deal the customer can't say no to. We get stuck trying to convince the key decision-maker and the tribe of influencers we can't even get in front of. In some situations, we get stuck at the contract level, and in every one of those levels of the game, dealstorming will get you unstuck.

Jill: I like that kind of thinking because seriously, I know you're doing it. You get stuck, and then you're proactively saying, "Let's do something at a higher level to help us get unstuck and to move the deal on to the very next step, the next phase where it's got to go next."

Tim: Yes. In certain situations, about half of the examples in the book, it's also about saving accounts, right?

Jill: You're right.

Tim: Sometimes, you raise your prices, and you've been meaning to raise your prices, and the client leaves you. Sometimes, your account gets poached by a company who's willing to do it for free or cheap.

We've learned that dealstorming works just as well to save your most important accounts because the essence of the idea is that when you bring people outside of sales into the process, other departments become your champions inside. If you really believe as an account executive that ideas can come from anywhere, you'd be shocked how obvious the solutions are.

Jill: Okay. Now, we're going to get into how dealstorming actually works soon, but I want to hear about the kind of research that you did to come up with this process. You have an extensive background from your basic Yahoo, plus you've done consulting work with a number of other organizations and talked to many more. Can you tell us about your background and where all this came from?

Tim: The whole thing starts in 1997. I was working for Mark Cuban in Dallas on his start-up, AudioNet. He brought in a new sales VP that worked at Ascend, which was like a company like Cisco, where they did really big, complex deals. So Stan comes in. On the first day, he's talking to all of us in the "Crows Nest," which is what we called our break room, and he said, "Every deal matters. I know they're difficult, but when you get stuck, don't go down alone." It just hit me.

Jill: What did he mean?

Tim: He meant, "Go grab somebody." His point was no one gets credit for failing on their own in a sales situation. There's no bravery in that. He goes, "If you get stuck on a deal, then go grab somebody in the broadcast center. Go grab a guy in Finance who could analyze your pricing or your revenue recognition. Partner with marketing. Stop treating them like a service." He said that, and I was like, "Wow, that's an interesting

idea.” It reminded me a little bit of brainstorming, but at the same time, he was stressing the sales process, right?

Jill: Right.

Tim: You do go down alone, but at the same time, you don’t break the back of the system. That’s where I leaned over to a guy next to me and said, “Cool beans. Dealstorming.” That’s where it started.

The first couple of years, it was unstructured. We did well sometimes. Other times, as Stan would say, “It was a goat rodeo. Get people in the room. It wouldn’t work.” I figured that out. By the time I got to Yahoo after the dot-com crash in March of 2000, our SVP in Sales knew that we had a very limited amount of time to do 50 or 100 deals with big names like Nike and P&G because our customer base at Yahoo up until 2000 was just fellow dot-communists like eToys.

Jill: Right, right.

Tim: That’s when we created the Value Lab, which was a Think Tank that worked with Stanford to study innovation in sales process. We did maybe 50 or 60 different dealstorms in the Yahoo experience between 2000 and 2005. I went and consulted after that, but during the next decade, I did another 60-ish. We did 100 dealstorms collectively, and that gave us one data set, Jill.

Then, in writing the book, I interviewed over 200 sales leaders at B2B companies that you might recognize in a lot of categories. What we studied is where they get stuck, how they try to solve the sticking points, what systems they’ve created, what works, what doesn’t work. We put it all into the dealstorming mix, and that’s the book that you now hold.

Jill: It’s impressive because you do get story after story about how different companies have used the dealstorming process to save accounts or get into accounts where they haven’t been able to get in for a long time. I want to ask if there are any types of accounts that are best for this. Should people be doing this on all their accounts, or is it something that you save for special accounts? If so, what kind?

Tim: That’s a really good question. The first step of the dealstorming process is to qualify the opportunity for collaboration.

Jill: Qualify?

Tim: Yeah. When you go beyond AE sales manager enablement, and you start taking time off engineers, and designers, and finance leads, and marketing folks, you have to understand there’s a cost to that—their time, their effort, and your political resources.

For all you know, sales might need other favors in the future, so there's a qualification formula I've developed that basically says, "You resource a dealstorm against the strategic value of the opportunity and the level of difficulty."

I think of it as a 1 to 10 score, 10 being high and 1 being low. And different companies have different readings, right? For example, I write about Skillsoft, the training company, in the book. They use revenue to determine that score. They're going to say, "At a certain dollar value, we are going to declare a dealstorm of sorts, and it's going to have a number of participants that is going to be commensurate with the size of the opportunity." This is very linear, right?

Jill: Right.

Tim: A 9 on their system might have a dozen people in the dealstorm. A 5 on their system might only have the "Fantastic 4," which might be 2 from sales, 1 from marketing, and 1 from delivery. It varies.

The degree of difficulty is the other thing to take into account. Sometimes, Jill, you've only got one problem on the deal—you can't get into the front door. That just escalated, right? In those cases, you're going to get one person to help you.

Or you're stuck on this specific contractual term, so that's not high degree of difficulty.

In other situations, you're selling to a committee with the procurement group behind them, and you're selling a very complex product where they're doing their own research and there's mass chaos. For a lot of those listening, you experience this. That's when you really need cross-departmental collaboration to create those solutions, those devices that cut through the mix and help you level up.

Jill: I see that complexity and chaos happening more and more in today's bigger deals and I think it's very scary for reps. They don't know how to do it alone. They've never had to manage anything like this, and it's not necessarily what people were hired to do.

Tim: No.

Jill: They thought they were hired to sell, and suddenly, they're here to manage a whole project, and they have competing priorities from groups that are spread around the country or across their office.

There are people with different priorities that are trying to make the decision, and it gets very hard to pull them all together.

Tim: It's very hard.

Jill: Yeah.

Tim: When I first started selling back in '70s—I'll date myself—I sold radio. You fill the funnel, you made the demos, you got an Insert Order signed, you pick up a check, and it was very simple. I still go to Radio Conferences, I was at one just a few weeks ago, and it's completely different today. The complexity of how their inventory management system works, and the Salesforce integration, and the way that their customers don't just buy radio, the buy market penetration, and they buy metrics, et cetera. It can make your head explode how complicated it is now to do a \$50,000 deal.

Jill: How many people are involved in it too? Again, when you expand the complexity and the special interests of different groups, can you say that it gets even more hard?

Tim: Yeah. It's real interesting too because when you think about how people buy services these days, there's the good, the bad, and the ugly. The good is that there's more sophistication. If you have a winning product or a service, you're more likely to have that recognized, so that's the good news.

The bad is that they've teamed up on you and they're now multi-disciplinary. Meaning, it's not just the user anymore and the IT chief. It's everybody. It's finance. It's operation. It's HR. It's third-party consultants, so they've got this cross-disciplinary team beating you down.

The ugly, Jill, as we know from our experience as CEB, is they don't agree with each other, so they're dysfunctional on top of everything. As a salesperson, you got to innovate your way out of this one on one, as well as solve all of their psychological problems. That's why I believe you have to build a network to sell to a network.

Jill: Exactly. In your dealstorming process, what I like about it is how you pull together the team. You're not just pulling together the guy who sits next to you. You're pulling together people from the different disciplines across the organization, all of whom could have some ideas, or insights, or information that could unlock the stuck point and create new options for going forward.

How do you decide, from your perspective, who should go on a team? I know you've already talked about the number of people on a team being commensurate with the value or the size of the opportunities for your organization, but how do you decide who should contribute?

Tim: There are 2 exercises I always advise. The first one is the Stakeholder Map. The best collaboration that happens in a sale situation is when the AE brings in the key stakeholders—people that have a really big stake in how it turns out.

They might have to deliver on the deal once it's done. Or they may be impacted

internally either having to do financial arbitrage or it might change the way they develop next year's marketing.

There's a map you can create that helps you understand who these 3, 4, 5, 6 people are who have a big stake in how it all turns out. That's important, Jill, because they're going to come in and get engaged because being involved early helps everyone avoid mistakes that can create a nightmare for them later.

They appreciate having a voice at the table even though this isn't about consensus building. What we find is that all of the expertise that led to all these solutions in the 70 odd dealstorms where we won the deal, all came from the edges of the organization ...

Jill: Define edges.

Tim: Such as the Revenue Recognition Analyst who sat in Finance who came up with the winning play for an ROI for the software installation that no one had thought of because he understood how his mirror at the prospect did revenue recognition too. Or situations where we'd have Account Coordinators who generally just take orders and deliver—they come in, and there's information that's never been put in Salesforce or never been shared at sales conference about how specific accounts have reacted to specific implementations that comes out in these meetings.

I find that in so many situations, the AE and the Sales Manager know about 20% of the information that's really out there in the market. Everybody else who's delivering knows the rest.

You bring them in, and you say, "I want you to join a team." I'm not asking them to come to a meeting—I'm asking them to join this real team." You'd be surprised how quickly they will reveal what they know, and that's the magic of collaboration because for me, even if you don't come up with the next best play in the meeting, anything that dramatically increases the quality of the AE's perspective about the whole deal leads them to quickly find a solution.

The last thing I'd say is that you also want to ask yourself, "Why are we stuck?" Traditionally, if an AE is going to lead a dealstorm, they probably want to consult with their manager where their manager acts as a sponsor. They have to be honest and say, "Why are we stuck in this level?"

Then, they have to say, "Why is that?" It's a game called "The 5 Whys." The outline is in the book, because the more you understand the real problem, the easier it is to invite 1 or 2 experts in that problem space to be the ones in the dealstorm who work with all the stakeholders.

Jill: It's really hard too for salespeople or AEs to sometimes find the real reason. They're so invested in what they've done so far and all the things that

they've tried to do to move the deal forward that sometimes they have a hard time stepping back and seeing what might be the real root cause of the issues that they're facing.

Tim: Absolutely. It's really hard because you follow a sales process, and when you get stuck—especially if you really believe in your product—it's their fault, right? We call it the “They don't get it.”

Jill: I've heard about “They don't get it” too. “It's all their fault. They're just screwed up. They don't understand the value we can bring. They clearly don't get it.”

Tim: That is no way to innovate, right? I think that most of the problems we have to solve to get a deal done are problems on our side. The way I think about it is by category. I ask:

- Is there a market issue that's causing us to be stuck that we haven't thought of?
- Is there a people issue on this account that we haven't thought of?
- Is there an information deficiency in this account situation that we haven't thought of?”

Those are just 3 categories. You'd be surprised, Jill, that as AEs have been writing what I call the “Deal Brief” to get everybody ready for the dealstorm and they move through the, “Okay. This is the problem situation. This is the influence map of who we've been trying to sell. These are all the activities today,” they realize, “Oh my gosh, I found the real problem.”

Jill: Even just them thinking about that and taking the time to prepare a Deal Brief. Let me just stop and say that many people have not heard about the Deal Brief before. That's the first time you've brought that up. You said earlier this is not a meeting. This is joining a team. That is fundamentally different.

Tim: I'm going to use a football analogy, but I promise it to be my only sports analogy on this call. When you join a football team, they give you a big huge notebook, and the notebook has all the plays in it, doesn't it?

Jill: Right.

Tim: It also has the schemes, such as “We run a 4-3 against this certain offense.” The point is you don't join a team without getting the notebook, and sales collaboration works the same way.

If people are important enough to be on your team, you have to respect them enough to brief them. That's something I learned way back in 2002 from Tom Kelley at IDEO, the innovation company. He told me, “Chance favors the prepared mind.”

Tom Kelley said the secret to their meetings was that everybody involved was briefed the Friday before the meeting, which was usually on a Tuesday. They were incentivized to read the brief on a Friday, so their mind could incubate over the weekend. The briefs were high quality, honest, and transparent, but they were still 2, or 3, or 4 pages at the most. As a result, they were read and people walked into the meeting with ideas and ready to start punching holes in the problem.

Jill: I think that's really crucial. When I read that in your book, I thought that's brilliant, and I have a pretty extensive background in creative problem-solving myself, so I understand the value of the incubation time.

First of all, the salesperson has to pull together this brief, which encapsulates the issue and what they have done already. That helps the salesperson clarify and think through things that otherwise would not necessarily be top of mind.

To give this to your stakeholders ahead of time, and to get them to read it beforehand, and I know you said the last step is to give each person a very specific thing to think about, a very specific assignment, right?

Tim: Right. If you're going to invite someone to the meeting, they should have a clear role. How many meetings have we been invited to where you have no idea why you're there? There's that moment of OS where everybody just goes, "Okay. Well, what do you think, Jill?" "Well, I don't know. I'm new here."

I believe that when I bring you into the team, I don't just brief you. I say, "Okay, Jill. I brought you in because you're on the sales operations team that does all the inventory management after the deal is signed, and I want you to take a look at 3 or 4 lookalike accounts because you have access to that inventory. Would you'd be willing to talk to us about alternatives and delivery in the meeting?"

That's a very specific assignment. It may not be part of the solution. It may be. But by telling you to think about that up front, there's a lot of things that happen.

- We know you're more likely to read the brief now.
- We know that when you come to the meeting, you will have a sense of expertise internally, giving you the confidence to speak up.

Quite frankly, it makes the meeting a lot more enjoyable because you're prepared. What I've learned is that a great dealstorm isn't just a meeting. It looks like an accordion. There are several meetings, and the trick is engagement.

How many times do we do the big project initiative kickoff, and it's like 15 people in the room. We're all eating cookies, and we're excited, and then by the fourth meeting, there are 3 people because the meetings were poorly prepared and awfully run.

I think that deal brief, that personal assignment is a glue that gets a person really onboard.

Jill: I agree with you because it invites them in and engages their brain before they get there. They know that they have a role. They know specifically what you want them to think about. They digest the information differently than if you just sent it out because they've got to be able to use it and come to this team as a contributing member, and know that is an expectation.

Tim: And they see things. They read the brief and go, "Did you ever think about such and such and so and so?" I can't tell you how many AEs would say, "I sent the brief out, and even before the meeting, we had a brand new problem, and somebody had already noticed the solution." The solution was painfully obvious that you can see it.

Jill: That's really true. That happens when you're just so focused on doing things the way you know how to do them, and you just don't see things that are outside your normal scope of operation. You don't think like if you're an AE, you don't think like a finance guy or you don't think like the sales engineer on the account. You see life differently. You see food differently.

Tim: Yeah.

Jill: Let's just go through the steps quickly. Can you list the steps because we're not going to have the time to go through them all in this interview. Then I have a couple more questions.

Tim: It's a seven-step process:

Step 1, you qualify. We talked about that.

Step 2, you organize. We talked about that too. You invite everybody that's a stakeholder, a couple of experts. They join a cause. It's not just about the money. I want to stress sometimes, it's about kicking the competition's butt. That was a lever I use all the time both at Yahoo and in my consulting gig.

Step 3, you prepare. That's the brief.

Step 4, you convene. This is a really important step. Meetings can produce magic if you run the meetings with strong ground rules and a really good sense of control over that meeting.

Step 5, you execute. You're going to usually determine the next best play, and you have to execute vetting all the assumptions behind it, building the prototypes. No matter what idea you have, you have to have a prototype. A prototype is worth a thousand meetings. You might even want to test that prototype with your prospect.

I call it a “whisper test” with your champion at the company. All of that goes into execution. You put the play in action.

Step 6, you analyze whether you leveled up, and if a new sticking point has raised its ugly head, or whether it didn’t work and there’s collateral damage, but you got to analyze what you did.

Step 7, you report. Initially, you’re reporting how things are in progress or have turned out to the deal team, but when you find something that works, you escalate the innovation up to very quickly get the case study into the sales process. Our research says it takes 30 months from a field level innovation to make it in the average corporation’s case study list. That’s too long.

Jill: Thirty months, that’s ... how many lost deals?”

Tim: There’s an old saying that Ed Deming, one of my old bosses in the quality movement used to say, “The only reason to think out of the box is to make it stronger, so please let us know when you get something right.”

Jill: That’s good. I like that. Okay, let’s just say you’re at the meeting. Running a good meeting is very different from running a sales call for many sales people, and that includes the skill of facilitation. I’ve used that word before and people looked at me like I was crazy.

**“Facilitation? You want me to facilitate a sales meeting or facilitate a meeting?”
“Yes, I want you to facilitate.” Can you define ... First of all, what are the skills?
What is facilitation at one of these meetings? What does the person doing who’s the salesperson who’s not used doing this facilitating? What are they doing, and how do they do it well?**

Tim: You lay down your ground rules, you disclose the agenda, you keep people on agenda, you focus the meeting on continual progress and finishing on time, and no one walks out of the room without absolute clarity of who’s on first.

That’s the secret to facilitation. Facilitation is about personal strength. What I mean by that is the strength to keep people on agenda, to protect the introvert, and the misfits, and the ugly babies known as “new ideas,” to get people to reveal their assumptions, and to help debate, not become inner-departmental argumentation.

Believe it or not, I think the AE should always be the facilitator, and that really applies in the phase of corporate wisdom where you’d think, “No, that would be an SVP of Sales that runs it.” No, because the SVP of Sales is going to intimidate everybody in the room for really telling the truth.

Jill: That's right.

Tim: If the AE runs the meeting, it's a growth experience. I never ran dealstorms once I became a consultant. I refuse to. I made the AE do it and I coached the AE because when she ran a couple of these across departments, she became a leader at her company. It's a tremendous exercise.

The most important ground rule is that ideas can come from anywhere, but we have to enforce that because "not invented here" is the enemy of dealstorming—and it's something we say it all the time.

The reality is someone from outside of your department doesn't operate under the same constraints you do in sales. They don't even know your sales process. That's why they have an idea that sounds harebrained that ends up being brilliant. Sometimes, the constraints of our sales process are still based on assumptions made in 1995.

Jill: Yes, that's true.

Tim: Ideas can come from anywhere. It's tremendously important to the process, but really, Jill, it's about saying, "The meeting is never going to be longer than 2 hours. If possible, it's only going to be an hour, so it's not painful to come to one of my meetings. We're going to spend 50 minutes debating the problem before we ever discuss the solution, and we're never going to go forward or backward in the agenda."

I think that's the secret to successful facilitation of a dealstorm.

Jill: It is a real difference, isn't it, from what most salespeople are used to initially? It's a learning and growth experience for many, many reps.

Tim: It really is because a lot of times, the salesperson's relationships with people outside of their group is either asking for a favor, gaining a little bit of favor or trying to be likable, et cetera,

Sometimes, they're engaging with the client, but usually because there's a deficit. There's something they don't know. They want that engineer to talk to the client to figure out, but this is really different. You're bringing people to the table and saying, "I want to know your opinion," and that's risky. It requires a lot of courage, but if you're strong, and you stay on agenda, and you follow the process. It's a winner.

Jill: You do say too in your book that this is not about a consensus decision. We're not trying to get everybody go, "Ooh, yeah. That's great. Let's do this." That's not the purpose of this meeting.

Tim: Sometimes, it's not about getting everybody in the room to agree with the idea. It's about getting the delivery team to say, "I can live with this. I may not like it, but I can live it."

A little trick here is I learned ... You stand up in the very first meeting, and you say, "We brought you in to improve our level of information, so we can win." Okay?

Jill: Right.

Tim: "Likely, we won't reach a consensus. Statistically, it almost never happen. I get that. If we don't reach a consensus, my manager and I are going to go off, take all of it into account, and make the best decision we can."

By saying that, Jill, you'd be shocked at how hard everyone in the room works to come to consensus. They work against that. They actively try to prove you wrong.

If you walk in here assuming everybody is going to hold hands and we're going to sing campfire songs, they will fight you, and they will say, "You don't understand this. You don't understand that," especially when the AE is junior.

That's a little hack I've learned to be around that, but here's the point. When you call a dealstorm, you're not giving up control of your commission or your destiny. It's really important to understand that. All you're doing is making it more transparent about what you've done today. So that is the risk, but if you follow the process and you tell the truth, I don't see the downside.

Jill: No, there's only upside to me. When I was reading, I was going, "This is really, really good." Your book is an incredible asset to the sales profession. It gives them, like I said at the very beginning, fresh strategies that have not been out there before. I've never seen the clear application of creativity and innovation approaches applied like you have to get sales accounts unstuck.

Tim: Thank you.

Jill: I am highly recommending it to anybody who is listening in and/or reading this interview as it appears online because it is definitely worth it. It will get everybody's minds thinking in new ways. Like I said, it's fresh, and it opens you up to new ways to address the challenges that people face every day.

Tim: Thank you so much, and I think it's also a huge leadership opportunity for those that have a lot of ambitions to move up to greater things because if you can handle a dealstorm, there's no storm you can't weather.

Jill: That's a great way to wrap it up. Thanks so much, Tim Sanders, for being with me today. I truly appreciate your time.

Tim: I do too. Thank you, Jill. I appreciate it.