DEALSTORMING

The **SECRET WEAPON** That Can
Solve Your Toughest Sales Challenges

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Sales Genius Is a Team Sport

I n the game of enterprise sales, completing a multimillion-dollar deal requires building diverse and engaged teams. There will be a series of obstacles at each level of the sale, often thrown in your way by people you've never encountered before. The vision that lands the relationship with a company isn't usually wide enough to elevate it into a strategic partnership. Clever, creative, and brilliant moves will be required and likely can't be made by a small group from the same department. Consider the following example, which illustrates this point powerfully.

Alyssa DeMattos, an account executive at online job site and employer talent solutions company CareerBuilder, thinks of her company's relationship with staffing industry leader Allegis as a love story. True to the archetypal plot, their connection has had its ups and downs. For years, Allegis was a major customer of CareerBuilder, buying their core products such as access to résumés and media promoting its staffing opportunities. But in 2008, the two companies "broke up" as a result of a contentious disagreement about a significant rate increase. Eric Gilpin, president of CareerBuilder's staffing and recruiting group, decided to wait a few years before attempting to resurrect the account. In 2011, he selected Alyssa as the new account executive

tasked with wooing Allegis back. He trusted her and knew that if anyone could bring Allegis back, she could.

Alyssa quickly learned that one of the reasons their relationship ended was that Allegis felt betrayed by CareerBuilder. Because the previous rep had relationships with only a few people inside one of the many business units at Allegis, the near doubling of their advertising and services rates came as a shock to the dozens of users throughout the company and the president of their biggest division. It escalated into a contentious phone call between him and CareerBuilder's CEO, Matt Ferguson, which resulted in the termination of their relationship.

Winning back their trust wouldn't be easy. Over the next year, Alyssa met with, listened to, and gave free advice to leaders and managers across Allegis. She became a trusted resource to a key Allegis executive who, in turn, gave her insight into the company and its changing needs. Eventually, Alyssa was given the chance to bring back the business via a side-by-side test with Monster, which had stepped in after the breakup. In 2012, CareerBuilder was awarded a contract with Allegis that was over three times larger than the one that fizzled out four years earlier.

While Alyssa was thrilled about the deal, she knew that the two companies could grow even closer in the coming years.

Around that time, CareerBuilder was making a big shift from media company (as a job board that aggregated an audience of job seekers) to technology solutions company. At a sales kickoff, Alyssa heard her CEO speak about his vision for the company's future, in which he detailed the tens of millions of dollars they were investing in acquisitions as well as head count at their Atlanta technology hub. He admonished sales reps to find opportunities where CareerBuilder could leverage their software programming, data, and website design capabilities into sticky, game-changing opportunities with their biggest clients.

Ever the matchmaker, Alyssa realized that Allegis was a perfect fit

for this opportunity. It occurred to her that if any company could benefit from CareerBuilder's move into Big Data and software as a service (SaaS), it would be Allegis. She canvassed her legion of friends at Allegis, only to find out that they had never outsourced critical technology solutions, so convincing them to "let go" was an exponentially more complex process than unseating Monster for staffing placement services.

As Alyssa soon realized, the only way to deliver her CEO's vision, in which customers would be married at the server with CareerBuilder, would be to fan out the dealstorming process across the enterprise. If she could bring enough minds together through collaboration, team genius would make a deal with Allegis happen. What she didn't count on was having to spend so much time and effort recruiting her dealstorm team and then getting them to jump through dozens of hoops over a protracted period of time.

Allegis differentiates itself in the staffing services market with its technology, including a multimillion-dollar applicant tracking system that their IT team built from scratch. Allegis trusted few, if any, outsiders to do its important engineering or development work.

Though they had successfully signed the deal CareerBuilder set out to make, Alyssa believed that Allegis was missing a key functionality that CareerBuilder could provide. From content creation to data-driven automation to website management, she knew there was a big opportunity for the two companies to partner on a career site for the hundreds of thousands of people in their staffing talent network. It was a matter of getting Allegis to show her what it had under the hood.

Alyssa quickly realized how difficult it would be to pry this information loose from Allegis, so she formed a dealstorm team to strategize on how to get the discovery process going and move through each level of the sale. The team—which consisted of the divisional president, her manager, and the account coordinator—came up with the

idea to host a technology best practices meeting, where technology leads from Allegis and CareerBuilder would share their strategies, demo recent projects, and discuss how trends in technology would affect them in the future. No selling, just comparing notes.

First, Alyssa needed a participation commitment from her IT team in Atlanta. So she hit up CareerBuilder's chief of technology, Eric Presley, someone she'd never met or talked to. She cold called Presley to sell him on hosting the meeting and assigning several of his technical leads to copresent. She explained how Allegis and CareerBuilder delivered staffing solutions in a similar way and that exposure of his staff to their top IT managers would be a collaborative win-win. Per Alyssa, she "sold him on the dream" of a new CareerBuilder that powered the candidate experience for companies as a critical services provider and not just a job board.

Impressed with her pitch, Eric gave the green light for the meeting and committed to his group's participation. At this point, he and a handful of his group leaders were pulled into the dealstorm in the middle of the conceive phase.

Alyssa paid careful attention to every detail around the Atlanta summit. She staged a dinner the night before the meeting, setting the table with napkins custom printed to read, "CareerBuilder Loves Allegis." She produced a branded journal for them to take notes in during the meeting. She even planned the snacks her guests would eat the next day.

Alyssa is a big fan of baked goods, especially cupcakes. She arranged for a local bakery to make cupcakes with candy hearts on top that read, "CareerBuilder Loves Allegis." Andrea and her manager picked up the cupcakes the morning of the summit. But when they opened the box, only minutes before the meeting would begin, they discovered that the bakery produced only half of the order. They would have only a dozen cupcakes for over two dozen attendees. Alyssa put out the cupcakes in front of the project leads, who started to joke that

though the cupcakes were delicious, they were going to run out before everyone got to try one.

At the meeting, as members were buzzing about the cupcakes, CareerBuilder engineers presented their newest tools and system developments. Alyssa noted that the Allegis participants repeatedly remarked, "We don't have that piece of the puzzle!" when Career-Builder showed them an element of their tech capabilities that Allegis didn't yet have. This is when Alyssa put a creative twist on the situation. The cupcake shortage, she explained, represented the situation Allegis had with their homegrown candidate experience system. The bakery didn't have the right system in place to consistently deliver on their orders, she said. The same was true for the Allegis side, where someone there wasn't getting "cupcakes" from the IT team. Without the data-driven back end that CareerBuilder offered, many of Allegis's clients would experience shortages of staff—a shortage of cupcakes—to fill clients' requisitions.

The "cupcake shortage" analogy had a visceral impact on the Allegis team, helping them to truly grasp the potential of a partnership. They opened up to the CareerBuilder team's proposition. By the end of the day, they revealed details about a robust career site project they had planned to build themselves.

At this point, they were so impressed with CareerBuilder's tech team, the meeting morphed into a collaborative product design planning meeting—where an Allegis executive bluntly asked Alyssa, "Couldn't *you* build this for us?"

"That's when we figured out the real deal," Alyssa explained. "If we built, hosted, and fueled their career portal, we'd be their partner for a long time." Not only would it boost CareerBuilder's pivot into technology services, it would be the largest deal in the company's history. But it would not come easy.

Although Allegis's IT managers were impressed with what they saw that day, they were still highly risk averse when it came to their

technology. They issued a request for proposals (RFP) within a few weeks to CareerBuilder and over a dozen other technology vendors.

To win the day, Alyssa would need to sway what she called "a tribe of Allegis stakeholders," including managers from regional divisions, finance, marketing, operations, technology, and business operations, and convince them that CareerBuilder was the best partner above all the competition.

Back in her office, Alyssa reviewed the dealstorm team she had assembled. She added a marketing manager to the team to bring insights to the presentation process and build elements for their upcoming presentation at Allegis headquarters in Baltimore. In a subsequent meeting, this expanded dealstorm team conjured up the idea of producing a video telling the product story from the candidate's point of view, making the point that only a leader in job placement like CareerBuilder could truly understand the end user.

The presentation went well and when Allegis announced the three finalists, CareerBuilder made the list, though their rival Monster was also still in the running. The stakes couldn't be higher. This would be a winner-take-all deal. Whoever would build the career site would also get the core listings and résumé access business. That meant Alyssa would lose the entire account if her team didn't win. There were millions of reasons for her to get highly motivated.

To be convinced, though, Allegis needed to try before they signed. It turned out CareerBuilder was the only finalist that didn't have a working prototype of a site for them to test drive. Although Career-Builder's engineers had built many career sites to date, none of them had the size, scale, and functionality of the one that they were proposing to Allegis. When Alyssa revealed this to one of her key contacts, he replied, "You are selling vapor!" She knew that to convince Allegis of their competency, they'd have to build a prototype just for them.

Eight engineers would have to come off their projects for six weeks to build the prototype. Furthermore, she wanted them to give the

Allegis IT team a developer key so "they could bang on the prototype and make it their own."

At this point, with so much on the line, all the company's engineers were heads down, building CareerBuilder's Talent Network, a major project that was also part of the CEO's vision for the future. The director of the project shot down the request for a prototype build, offering instead to deliver a handful of mock-ups and screen shots for her final presentation. "That would not work," Alyssa said. "I would not take no for an answer!"
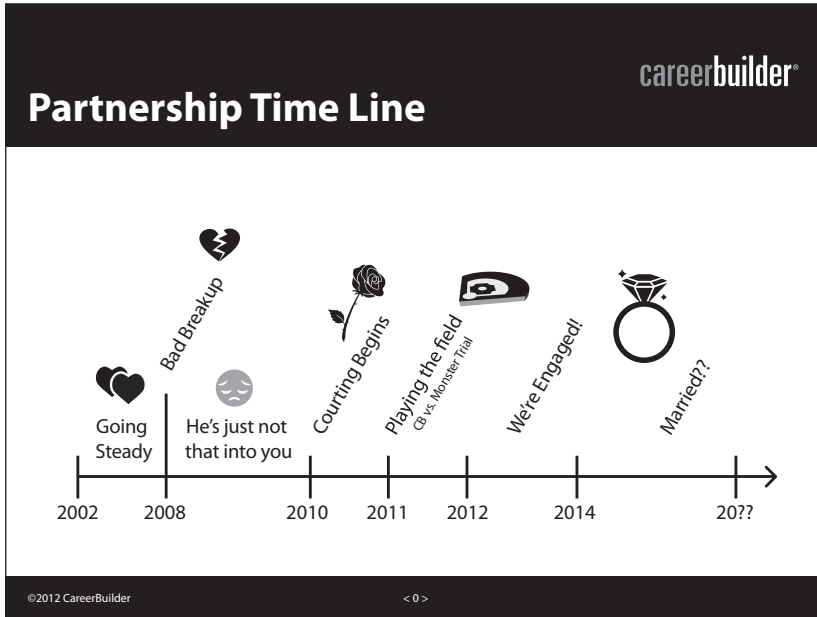
Even though the Allegis career site project had a lot of upside for the company, CareerBuilder's chief technology officer, Eric Presley, was constrained in terms of head count, and his team was already overwhelmed. During an hour-long phone call, Alyssa peppered him with questions about the Talent Network, its functionality, and how his team conducted quality control. (Later, he told Eric Gilpin that he respected how many questions she asked.)

To sway him to pull people off other projects and onto this prototype, Alyssa explained that she would collect immediate feedback from the Allegis IT team on functionality, which could in turn reduce the cycle time for his Talent Network build. By giving his engineers direct access to a live client, they would receive instant gratification for programming and engineering work they were doing. It made sense to Presley, as there was no other feedback loop set up to vet his team's project for real client user experience. Believing that the prototype project fit within the Talent Network road map, he approved the build. Alyssa didn't take their involvement for granted, either. She explained to each engineer the strategic value of the project and surprised them with lunch as they worked on the prototype.

When Alyssa and her team presented a live demo of the Allegis career site prototype on pitch day, she explained how they had diverted precious resources in quest of this opportunity. After revealing a slide charting up-and-down relationships, culminating with a prototype

along with a developer key, she declared, "It's time for us to get married."

Within a few weeks, she received great news: CareerBuilder won the competition, and it was time to move to contract.

Then they came to a hitch in the last level of the sale: payment terms. By policy, Allegis paid for projects upon completion. The problem for CareerBuilder was that it would take at least six months to complete the build, and by their policy, that would be too long to wait on any form of payment.

"What Allegis needed to see was work they could touch," Alyssa said. So, in collaboration with legal, finance, and HR, they came up with another solution. CareerBuilder would hire a tech-savvy project manager the day the contract was signed to provide concierge-level services to Allegis, "officing" at their headquarters in Baltimore.

This new provision would increase the contract price by one hundred thousand dollars but would expedite the build and ensure

real- time feedback. This creative move signaled to Allegis that work would be delivered from day one, and CareerBuilder would immediately have to allocate cash to consummate the relationship and ensure its health.

With this addition in place, Allegis signed the contract, including advance payment. The marriage was made. Today the two companies are closer than ever—as are the collaborators on each side that made the deal happen. Mike McSally, vice president of enterprise operations at Allegis, even sent Alyssa flowers on Christmas Eve in 2014 as a token of his appreciation for their relationship. When she was given the account opportunity in 2011, Mike was the key person who had to be persuaded to give CareerBuilder another chance. Alyssa tenaciously pursued building a relationship with him by offering valuable advice, humility, and a dab of her charm. Mike and CareerBuilder's CEO play golf together when they get a chance. The deal was successfully contracted and conceived, Allegis convinced, and contract reached thanks to Alyssa's persistence in applying dealstorming practices and process to all stages of the sale.

"That deal put us in the billion- dollar annual revenue category," says divisional president Eric Gilpin. "And it was classic Alyssa. Whenever you put obstacles in her way, she digs in, asks questions, recruits coconspirators, and finds a way to win."

In the course of writing this book, I interviewed over two hundred sales leaders about their most innovative deal- making situations. In many instances, the stories they first shared revolved around a single person and his or her breakthrough creativity.

The idea of a lone genius is a romantic notion, really: a single person, working alone, receives divine inspiration and through grit and determination changes the world. "We want to believe that seemingly unique inventions and creations are the product of a sole creator," explained David Burkus, former pharmaceutical sales representative

and now college professor and author of *The Myths of Creativity*. "When we have a creative idea, we want the world to recognize us as the genius we are, so we, in turn, recognize others as sole geniuses behind their great ideas."

In other words, our desire to be recognized as individuals makes us buy in to the illusion that individuals produce acts of genius. "It's part of how we are wired to think," David told me. "The hero's journey is part of mythology. People love to talk about Steve Jobs as the genius inventor, but often they don't talk about the other Steve [Wozniak], Jony Ive, or Tony Fadell. They are in the footnotes of most conversations."

This mythology was promoted by early creativity research, which diligently focused on the individual genius, his or her background, and the unique working environments, which led to breakthrough thinking. But as more social scientists and psychologists entered the field, new facts emerged about how genius actually manifests. "Beginning in the 1990s, our research began to point in the opposite direction," writes University of North Carolina professor Keith Sawyer in his book *Group Genius*. "We began to see that innovations once believed to be the creation of the genius actually emerged from invisible collaborations, and the collaboration was responsible for famous creations throughout history." In his book, he explains how "Thomas Edison" is considered a collective noun in the industry, representing over a dozen people he worked with. "We screw in light bulbs today because one of Edison's lab assistants saw Edison cleaning his hands with turpentine; when the inventor unscrewed the metal top of the metal can, the assistant had the idea of the screw-in lamp base."[1]

The popular trope doesn't match the truth. The solo inventor is a better story, so that's how it gets told around the campfire and in most books. And in most companies, too. We love to praise our rock stars more than account for our bricklayers. But often, when I dug into the stories in this book and talked directly to the people at the center of

the deals themselves, it turned out the lone sales genius wasn't really so alone. He or she was working in a collective environment where multiple players built on observations, improved on ideas, and worked together as a team. While the account executive owned the problem, the team produced the true genius.

There is no lone genius in sales. No individual account executive or sales manager makes the big deal or saves the strategic account on his own. Lone genius isn't the difference maker in closing complex sales. The source of true innovation is teamwork. As Sawyer says, "Collaborative webs are more important than creative people."[2]

Let that sink in for a second: groups of regular folk working together as a team trump innovative thinkers. Wow. If you're a sales leader, this should change your mental model for recruiting. In this complicated selling environment, you should stop focusing on hiring "top producers" and, instead, search out and acquire team players with the tendency to spin up webs to capture sales opportunities.

There's another reason this loner superstar myth needs to vanish from sales culture: we need to proactively pursue collaboration and not look at it as a last resort option when best individual efforts aren't enough. Through his work with companies and organizations, David Burkus came to the same conclusion: "If we believe that innovation is a solo effort, then we're more likely to remove ourselves from the networks we need." When it comes to problem solving, your network truly is your net worth.

Genius is in the process that creates a remarkable work, enabled by a collection of people working together. It starts with a commitment to solve a problem, an observation that leads to an idea, improvements to the idea, and then, of course, relentless execution. A single person cannot complete this process. It takes a team.

If you think your sales department is already working as a team, I have a question for you: Is it a tall team or a wide team? This is an

important distinction and yet another fallacy of thought in sales leadership circles.

When your team is vertically organized to include sales leaders, managers, reps, enablement, account management, and sales training, that's not a collaborative web—that's a silo. It's a collection of people steeped in sales-think, which is usually pretty insular. The sales silo sees other groups around the company as either service providers or "the land of no."

Yup, I said it: sales builds silos, often hardened to protect them from the outside world. In fact, according to several prominent CEOs I've talked to, sales is as bad at building silos as product groups or brand teams. One reason for this self-selective insulation is that many account executives find it difficult to give up any level of control over the selling because they fear that collaborating with other departments could lead to them having an equal say in what can be sold, and how. Further, many in the sales department believe they know the customer better than anyone else in the company because they talk to the customer every day.

However, your dealstorming team will not be complete unless you create a wide team to diversify the mix and, most important, cover up any holes or blind spots that can lead to an easy win for the competition. Think of it this way: If your football team consisted of a quarterback, three running backs, six wide receivers, and two tight ends, who would block? Who would play defense? Who would kick off or attempt field goals? You'd field an offense-only football team.

You will struggle to solve your sales challenges if you are concentrated on the sales side of the ball in building your dealstorming team. A bunch of people in the sales world will think, well, like salespeople. You'll lack key insights that affect the value of what you sell, how profitable it will be, how it will resonate through the prospect company, and, most important, whether you can actually deliver on what you sell.

To actually get the benefits of the dealstorming team, you must create a wide team like Alyssa DeMattos did, breaking organizational boundaries and ensnaring unlikely players, such as cross-country engineering groups or customer champions. The wider your team is, the stronger the collaborative web becomes.

Aerospace and transportation company Bombardier responds to deals "stuck in the pipeline" by employing what it refers to as peer consulting cohorts. According to CEB's Jessica Williams, this group of managers, from across various business units, "push each other's thinking and develop approaches to real-world business problems."[3] This combination has led to a competitive advantage in multiplayer bid situations in which billions of dollars are on the line for those who weave the right approach.

Like Bombardier, when a B2B sales culture embraces the team sport of problem solving, companies usually become winners in their market, or "world-class performers," according to a 2014 study by research group Miller Heiman Research Institute.[4] World-class sales performers are defined as companies that outperform their rivals by an average of 20% across key metrics such as new account acquisition or average account billing over a protracted period of time. When Miller Heiman analyzed what separated these companies from the pack, "conscious collaboration" emerged as the decisive factor.

World-class sales performers were twice as likely to collaborate across departments to pursue big deals. One key point of collaboration for enterprise deals was between sales and marketing. In this case, the world-class organizations were almost three times more likely to align the two groups than their rivals. When it came to retaining strategic accounts, the habit held, as the world-class organizations were twice as likely to manage them with interdepartmental teams and sales department members.

These top performing companies didn't team up for the sake of teamwork. "The purpose of collaboration is not collaboration itself. It's

achieving better results in a shorter amount of time," said Miller Heiman research director Tamara Schenk. "It allows individuals with disparate areas of expertise and different roles to work together . . . to multiply their individual contributions."[5]

One of your most important leadership missions is to overcome the bias against cross-departmental collaboration. It's the only way you can become a world-class selling organization. With the dealstorming process, you can build a wide web but still maintain ownership of the process.

Why don't more sales leaders routinely gather up teams to attack their toughest sales? It seems like it would only make sense to throw a bunch of people in a room so they can figure out how to make the deal happen. You know, like brainstorming! While it's true that the more minds you bring to a problem the merrier the conversation can become, bad things happen when they don't know where they are going.

As Mark Nelson, senior vice president of sales at custom computer chip maker Altera told me, "Without the right process, you get a mess."

Let me make an important point here: dealstorming is *not* synonymous with brainstorming, the no-holds-barred approach to problem solving conceived by ad agency mogul Alex Osborn in the early 1940s. It's very important to explain exactly what the difference is and why the highly structured dealstorming process is so important to your team's success.

Osborn was one of the original "Mad men," who saved his fledgling Manhattan ad agency from post-Depression-era bankruptcy by landing the Goodrich account through a brainstorming meeting with his staff. He was so inspired by the victory that he committed the rest of his career to scaling his discovery to every nook and cranny of the business world.

It was the right stuff for an ad agency, where prospects looked for never-been-done-before campaigns that would break through the noise and grab attention. If you've watched as many episodes of *Bewitched* as I have, you know that it takes magic to come up with a truly novel idea for an ad campaign.

Osborn introduced his agency's idea-generation technique in 1942 in his book *How to Think Up,* with two key assumptions: You need a lot of ideas to find a blockbuster, and "Creativity is so delicate a flower that praise tends to make it bloom, while discouragement often nips it in the bud."[6] The four resulting rules for brainstorming included: Go for quantity. Defer judgment. Encourage wild ideas. Build on others' ideas.

By the 1960s, brainstorming was seen as the go-to method of "coming up with a lot of ideas" for product development and project management. Companies, civic organizations, and even governments employed Osborn's process, calling brainstorming sessions when feeling a little stale or under fire to "think up something quickly."

In most cases, a random group of people was ushered into a room where a facilitator would lead a conversation about how to solve a problem or create a new approach to an old one. A few hours later, a laundry list of ideas was produced, to be analyzed later by management. I'm sure you've been roped into a few of these brainstorming sessions. I know I have.

Over the last fifty years, mounting evidence suggests that, in many cases, Osborn's brainstorming technique doesn't always produce quality results. Yale University initially compared brainstorming groups with individuals working on their own and found that the latter outperformed the former in many cases.[7] Later studies explained why: incubation of a problem space is required to spark useful creations. Dominant personalities can take over a brainstorming meeting, causing everyone to anchor around their ideas—many of which aren't new. Instead of producing lots of ideas, participants are actually

blocked in their ability to contribute as a result of filibustering. In some cases, thinking their ideas aren't required, participants dial out, a phenomenon known as "social loafing."[8]

In 2003, a widely cited study[9] by UC Berkeley researcher Charlan Nemeth challenged the key assumption of brainstorming: Does criticism decrease creativity? In this social science experiment, three groups were compared: those with no instructions for their brainstorming session, those with instructions not to critique ideas, and those with instructions to critique ideas thoroughly. Surprisingly, the third group, which debated ideas in session, produced by far the most useful ideas.

Still, there are situations in which Osborn's go-for-it approach is still valuable, such as product breakthroughs to revitalize a company or marketing ideas to differentiate a product in a dense marketplace. But in the case of business-to-business sales, a new process is required that encourages premeeting work, information sharing, candor, quality ideas, and results that are scalable and repeatable.

When you build a team to pursue a deal, its participants are expected to give their time and attention to it, in many cases forsaking their day-to-day functions. You don't want to waste it in an attempt to boil the ocean. You aren't looking for a "moon shot" idea as much as you are looking for a cascade of solutions over time. A deal team isn't looking for a list of possibilities but, instead, a winning play that takes them all to the next level.

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 that will ensue. Several sales leaders have shared stories with me about collaborative victories. To a person, they all wished they had a codified process in place that could repeat them at will.

"We've been pretty good at building teams when we have to," one prominent software executive told me, "but we need to make the leap to great, and that will require a process that everyone understands and

buys in to." His point was that although smart and creative people know to fan out, curate the best ideas, and lead their ad hoc team, without a defined path, the game is unpredictable without a repeatable and scalable process.

You have no choice but to organize. Your prospects and best customers have already teamed up and, in some cases, brought in outside firepower to win the day. In many cases, you are outnumbered. They've built wide teams and continually improved their buying process and prepurchase knowledge.

With the dealstorming method we're about to dig deep into, you can fight fire with fire, organizing your own teams to compete for the win, and do so again and again.