

Organizational Mapping Made Easy

by Jeanne Buchanan

FLATTEN. MATRIX. LEVEL. These trends in organizational structure improve the speed of the buying decision process and drive new initiatives in highly competitive environments. Sellers who employ techniques that mirror this speed have a distinct advantage.

Customers appreciate salespeople who can distill and react to their decision process, because it saves the customer time and expense. It also adds to their confidence that the seller will perform efficiently once given the contract or commitment to move forward with the proposition. So how can you stay abreast of organizational dynamics in your customers' fast-paced environment? Make their organization charts come to life through mapping. Here's how.

1. Identify the people who will play the following roles in the buying process.

- **Decision maker** – The person who directs the analysis and evaluation and makes the final decision on the project and the sellers.
- **Approver** – The economic buyer. Typically, a senior executive from whom the decision maker gets the final authority for a project or acquisition. Sometimes a steering or management committee performs this function. The approver normally has broad functional responsibility and decision-making authority, and often fiduciary responsibility.
- **Key user** – Individuals that directly benefit from the project and who articulate the on-the-ground business need.
- **Influencer (internal and external)** – People who could influence key executives, such as analysts, consultants, competitive sales personnel, professionals who are charged with project management, contacts in other companies, and even relatives.
- **Change agent** – Respected leader who has the courage and capacity to lead people and organizations in transformational change. Sometimes appointed. Sometimes self-appointed.
- **Gatekeeper** – A person who decides who will be allowed entry into the competition. Often this person can say no to a seller during the pre-bid seller selection, but may not be involved in the final selection process.
- **Analyst** – Usually a staff person who assesses the technical or financial merits and feasibility of the proposal.

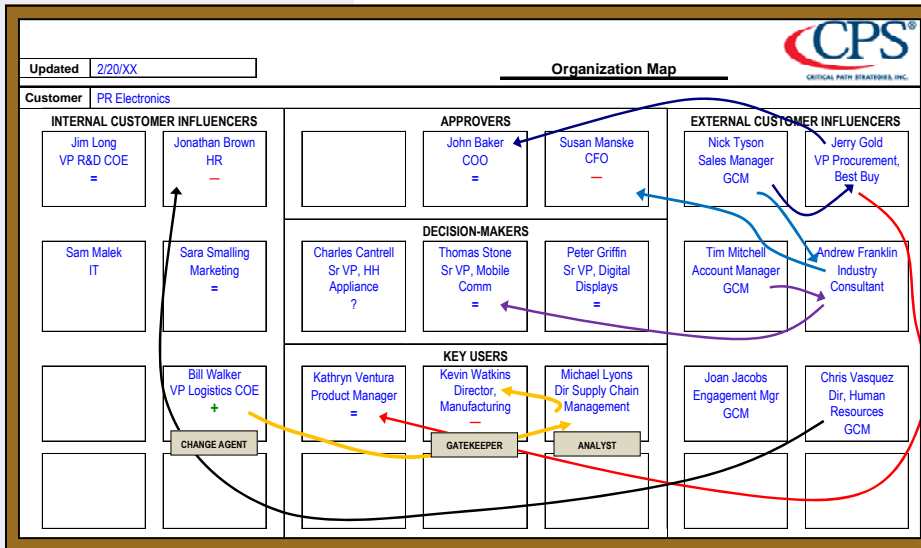
Before customer names are placed in these roles, be sure your team debates specifics, such as a person's role in this decision, accountability, authority, and influence.

Benefit: This technique inevitably leads to crystallization and consolidation of what is fact and what must be learned. A set of excellent questions, timed appropriately and directed at the heart of the sales process, is distilled from this exercise.



Organizational mapping is an excellent tool to validate appropriate client coverage and explore possible relationship strategies, specifically as it relates to identifying the decision maker in your customer's buying process.

- Assures your sales effort optimizes valuable time and validates appropriate customer coverage
- Improves efficiency of your pre-call briefings
- Onboards your new team members so they quickly understand customer dynamics and can better react in a call or presentation
- Allows clients to see your sales team as a highly valued partner
- Increases your odds of closing the sale



2. Validate the reality of your customer's decision process. Plan a series of specific calls to the individuals identified in the mapping exercise as validation checkpoints and selling targets.

Benefit: These calls help determine key business initiatives and personal needs, and gain further insight into the decision-making process.

3. Further develop the map to identify needed lines of influence and optimal sales coverage. Identify people in roles with a neutral or negative position toward the proposal. Pinpoint these people for coverage with sales call and sales information.

Benefit: Without this step, crucial sales strategies are often overlooked or are not communicated to your team. Your team is able to create a thoughtful plan and avoid negative surprises as your selling campaign proceeds.

4. Share the map with all members of your extended team. Consider sharing it with your customer.

Benefit: A consistent message can more easily be developed when all sales and support people see the same picture of the client. Mapping results is efficient use of sales time, and the client is spared potential confusion or redundant coverage.

By sharing the map with your customer, you will often walk away with validation and shared specific insight into a unique decision process. It also provides the opportunity to correct a situation, if need be. It saves both companies time and energy.

The most efficient salespeople stay abreast of organizational dynamics in fast-paced environments. They employ techniques and tools to assure they know early, and accurately, who will make the decision, who will approve it, who will influence it, and who will implement the decision. By mapping and updating your customers' decision process, you clarify customer decision-making roles and assure focused selling time on the most important people.

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