The ABC of Qualification – let's get emotional about this

January 2021, Hugo Williams

Sales qualification is so boring that it’s interesting.

I’m going to qualify, right up front, that this is not about general sales, or qualifying initial enquiries in or out of your pipeline, dependent on whether the customer is suitable for your product.

That classic, formula-based, step-by-step approach is of course valuable, principally in allowing the sales person to move quickly onto more likely prospects. What I'm talking about is qualification in account management, where, by definition, the vast majority of enquiries come from existing clients or new prospects that are already eminently suited to your product or service, and are, to a large degree, yours to win or lose.

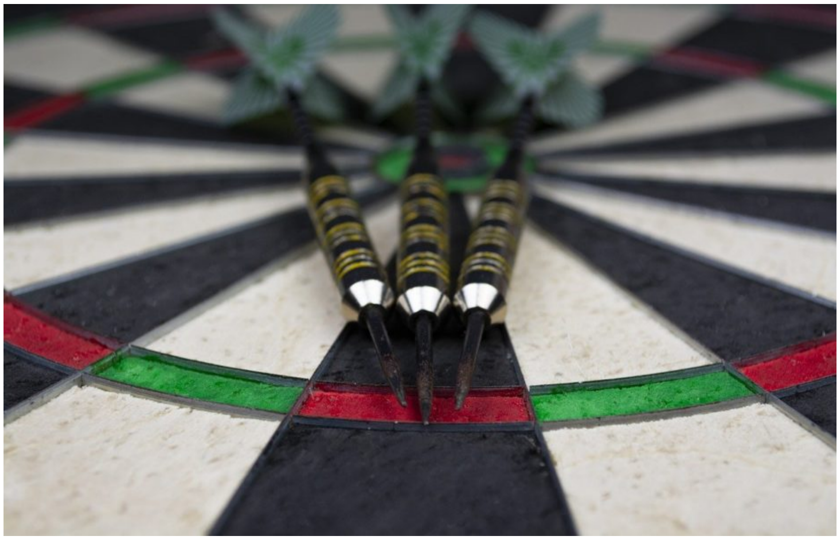
So why is qualification boring, and how is that interesting?

It's boring because it's an important aspect of sales that is vastly over-documented, with multiple suggested approaches, spawning a huge vat of acronym soup. Hands up who would like a detailed explanation of BANT, CHAMP, FAINT, SCOTSMAN, PPP, ANUM, MEDDIC, MEDDPICC, AAAA, NEAT, CRAKIT or even CGP TCI BA? I didn't include the versions where the letters are simply changed up: you can find reams of authoritative opinion on whether BANT should be replaced by NABT, for example. Gripping stuff, for sure.

Why interesting?

Well, inside all the jargon, the deeply rational and process-driven formulas actually have unstated, and I suspect widely underplayed, emotional goals.

> Effective qualification helps the client feel they are in good hands, promoting client trust through feeling understood. Qualifying enquiries helps the buyer feel that the vendor understands them, and gives them confidence and direction to move forward. This is absolutely vital, as we don't buy from people who don't 'get us'; we need to feel understood.



On the sales side, a disciplined approach to questioning will avoid the salesperson getting carried away with excitement and assuming that all the variables are already in place. It’s perfectly understandable that salespeople get excited by large prospects. Confirmation bias manifests as treating enquiries as lay-ups, and often results in crushing disappointment when the lead falls apart just as it should actually be closing. Vendors get caught up in the thrill of a big sale, putting a huge amount of effort into crafting a perfect solution, only to find that a basic check on budget, timing or authority has been overlooked, and it’s all been for naught. **Disciplined qualification can mitigate the risks posed by the salesperson’s emotional susceptibilities.**

Looking at just one framework. The simplest and oldest - BANT - pioneered by IBM in the 1960’s, is a good place to start.   BANT is Budget, Authority, Need and Timing. These are the core areas for qualification. There are other aspects and questions that are useful, but until you have a good idea of the answers to all four of these, you should tread carefully.

Additionally, I’m making no claims about the order in which BANT is investigated – I don’t see value in a doctrinaire flow, as long as each element is covered. Different relationships and conversations will present opportunities in different sequences. That said, I believe it’s logical to start with ***Needs.***

NEEDS

We all need to feel understood. Unless the client knows that you have received their message and understand their issues, they will have no faith in your proposed solution*. This is vital – I can understand you perfectly well, but unless YOU are sure that I do, you won't have much faith that I can help.* It pays to remember that solutions only exist because of problems, so dig in and find the pain.

Prospects must tell you directly about their issues in order to feel that you understand them, so you need to have a good bank of questions and areas to explore. Imagine you are a doctor; don't promote remedies until you have been through all the symptoms and asked what recovery would mean for the patient. As always, start with open questions and then narrow down to more closed questions or actual suggestions.

> **Needs/pain can be multi-faceted, so ask a variety of questions to be sure to capture all angles.**
>
> How did this need come to your attention? How long has this been going on?
> What effect is it having? What is does the problem mean if it continues?
> And if it goes away?
> What, if any, other solutions been tried?
> What is it about us that you thought of when assessing the solution?
> What do you want us to change?

In what order should you address the remaining areas; Authority, Budget and Timing? I don't believe in a hard and fast sequence here – it will vary from prospect to prospect, and situation to situation. Within a large account, the Needs discussion will often naturally lead to Authority, as the person investigating the solution is likely to hold some generally administrative role and be charged with investigating solutions. You need to find out who the business lead is and make an effort to talk to them. The more bespoke your service or solution, the easier this will be.

> **A good line of questions here runs something like this: "As you know, we design to fit the particular needs. Your overview is super helpful, and I want to make sure we can really nail this for you. Can we both get on a call with John Smith, so I can help you get him to see that we can handle this?"**

From here Budget falls into place quite naturally, as does Timing. The order of these last two pieces will be largely interchangeable. The main thing here, for vendors, is don't be afraid to ask, particularly about budget. Clients expect to be asked, it's fine. They are far more likely to feel that you are handling their needs in a professional and buttoned-up way if you ask the process-oriented and 'difficult' questions calmly, as opposed to leaving a void in your approach. It also helps level the power, as the understood implication is always that without budget there is no point in progressing towards a solution or proposal. This helps them feel that you are aware of their responsibilities in arriving at a mutually beneficial solution, and adds some accountability at their end. You are solving this together, so help them understand their role.

If you are windy about asking for about budget, try acknowledging that the question itself is uncomfortable. Being frank about the necessary evils will engender sympathy and get you an honest answer. "This is a boring question I know, but please take me through the budget process and timeline" or "It's never easy to ask about this, but how is the budget looking?"

In conclusion I want to underline that asking qualifying questions serves both sides equally. By being disciplined with your approach to emotional management you can truly move the relationship from vendor/buyer to aligned partners. You will have happier clients when they feel that you understand them fully and are managing the process thoroughly; and on your side you will be able to be confident that you aren’t getting ahead of yourself and leaving loose ends that will trip you up later.

My last advice is to go back to the acronyms. ABC. Always be Closing. Think of qualification as continual closing; at every step, every call, every question and answer, you are wrapping up loose ends and deliberately progressing on down the field. You will both feel much better.