



— HOW —

NOT TO

— SELL —

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## Let me tell you a story about how NOT to sell.

I was reviewing a first-time discovery call, led by senior sales, with a target account represented by their primary economic buyer. This buyer was familiar with the sales leaders and industry, but not this specific company's solution.

### Over the course the call, I flagged 3 major issues



Current similar solutions were failing badly, both in reputation and KPIs.



Prospect's CFO was cutting budget for similar solutions, and would need to approve a new vendor/ additional spend.



Prospect said no current need to test/ trial a new solution.

In sales, we hear similar statements all of the time. Our success is defined by the way in which we investigate & work through them, or qualify out.

After that bit of discovery, the sales team talked the prospect through a 20-minute pitch deck, detailing the solution, services, and differentiators, capped by assurances that these vendor failures and underperformance would not happen with them.

Critically, here's what I didn't hear the team do:

Ask why the EB took the call if already skeptical, and the CFO was cutting budget.

Ask why/how current programs were failing, and what would have to be improved in evaluating a new vendor to achieve desired outcomes.

Ask why our discovery call was booked without a current need/situation, or what that need would look like in the future.

Schedule an on-the-calendar, agreed-upon Next Step.



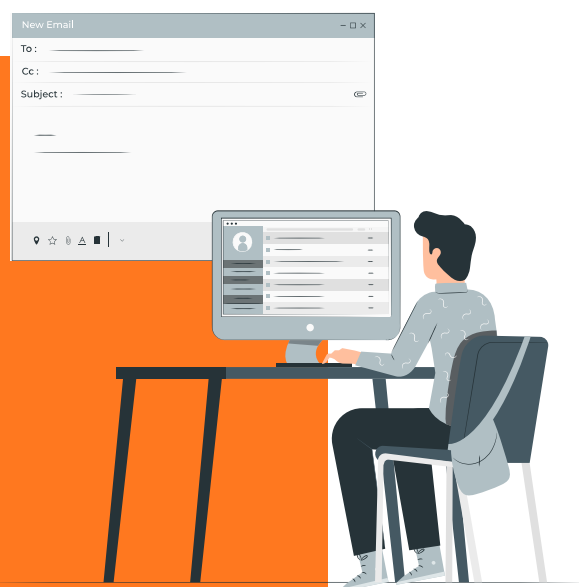
Post-call, I met with these senior leaders to discuss the opportunity. I raised the above points as key moments missed that would likely doom the opportunity, and offered specific actions and advice to fix them.

The team rejected the advice. They were content to provide surface-level information to this buyer, and maintained the strength of their value prop would sell itself.

On the lack of a scheduled Next Step, a cornerstone of opportunity management, I was adamantly told *"The prospect's interested, he gets it, don't worry, he will come back to us very shortly."*

**Care to guess the status of that opportunity 3 months later?**

**Zero email or phone call replies. No replies from ANY associated stakeholders.**  
**Zero meetings. Zero progress.**  
**A dead opportunity decaying in the CRM.**



Now, I am sure we are all guilty at some point in our careers of that exact call: middling discovery, pivoting to reading slides, and then creating a weak opp in the CRM. I can recall doing that many times, with similar outcomes, and not understanding why.

Our continued personal & professional growth is dependent on recognizing those mistakes, so we CAN learn from them, improve our craft, and get better results next time. It's not bad to raise your hand and say "I didn't do a good enough job, I can and WILL do better."

That's the reason I knew this opportunity wouldn't amount to anything. I recognized the trajectory as same-old, same-old. The sales team didn't execute at the level the prospect deserved or expected. Fundamental sales best practices, like scheduling next steps and digging deeper into problems, were ignored.



**But the biggest disconnect? The sales team didn't think there was opportunity for improvement. They didn't see missed steps as an opportunity to learn more. They were content to do things their way, and simply let it play out – a losing proposition.**



My story is a common one across a lot of revenue orgs. So what are the lessons we can take away?

1

Our story is textbook how NOT to sell. Don't "pitch and pray." Your customers deserve better and expect better because other sellers out there, your competitors, ARE doing it.

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2

The 3 flags I mentioned were fantastic opportunities to show curiosity, dig in and ask questions that would have helped the team A) understand the buyer more, B) get to the root of problems and impact, & C) better position the solution to help OR disqualify this deal without creating an opportunity.

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3

Scheduled next steps are fundamental to every deal, and if you're not leading them, you're not executing at a high enough level to win consistently.



4

If you have a mindset that is closed off from learning and self-reflection, you will predictably not grow. The world will pass you by. The biggest failure here was rejecting opportunities for improvement, contributing heavily to killing this opp and leading to similar future outcomes.



You know Einstein's quote? *"The definition of insanity is doing the same thing over and over and expecting different results."*

The Wolff Den is all about embracing mistakes and failure, so that we can collectively grow. But there has to be commitment to improvement. The decision to change is in your grasp. Every day is a new learning opportunity. Seize it.



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**Don't pitch-and-pray.  
Be curious. Execute  
professionally. Be  
open to learning.**

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Let's end on a high note by putting learning to practice using this call as an example on how to avoid a "pitch and pray" scenario.

1

**Current similar solutions were failing badly, both in reputation and KPIs.**

**Ask about their self-diagnosis of the problem, what metrics are they tracking, and where do they need to be:**

"Why do you think current solutions are failing? What major metrics are showing you they're not performing to your standards? What is the gap between where you are and where you need to be? What is the impact of that gap on you and the team, what is it not allowing you to do?"

2

**Prospect's CFO was cutting budget for similar solutions, and would need to approve a new vendor/additional spend.**

**Probe about what would be needed to show the CFO a new solution is the answer:**

"Your CFO sounds like a good steward of company capital. What specifically would you need to take to him to convince him this solution deserves funding to tackle your problem?"



3

**Prospect said no current need to test/trial a new solution.**

**Understand the exact circumstances that would motivate the prospect to change:**

"Your current metrics don't sound sustainable, and I wouldn't ask you to invest in something you're not confident in. Can you walk me through a scenario that would make you take quicker action in trying a new solution?"



**The failure to agree and schedule a next step.**

**Agree with their objection, and pivot.**

"It sounds like you don't want to take action on this now, but what if the problem gets worse tomorrow...so would it be the worst thing in the world for us to connect again next month for 15 minutes to review the case study and materials I'm sending over, and evaluate conditions for a potential trial?"



**If you simply cannot move forward.**



**Qualify out.**

"Based on what I've heard, it doesn't sound like this is a top priority right now, and I don't want to waste your valuable time sending a proposal for review. I'm happy to come back to this when it is a priority for you, would you have an estimate on when that might be?"





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