

ROLES IN THE BUYING DECISION-MAKING PROCESS (DETAILED)

Role	Definition	Formal Role in the Buying Process	Typical Level of Influence on the Buying Decision	Criteria	Your Objectives	Useful Tips	Comments & Considerations
Approver*	Person or group of people having the authority for formal sign-off of the expenditure & signature of the contract	Yes	High* unless the approval is a mere formality e.g. when the Decision Maker is hands-on and the Approver is detached from any detail	Has the formal responsibility for final authorisation of commercial commitments of this size	To get the Approver to actively support the project as a priority and prefer/approve your solution over the competition if asked	Treat the approval as a separate decision and determine influencers if you can't get access	*May be same person as the Decision Maker, particularly in small companies e.g. with an owner-manager. In large companies either: the Finance Director; Commercial Director; or the boss of the Decision Maker. In small organisations, the Approver may be a major investor or the funder e.g. the buying company's bank.
Decision Maker*	Person who has the authority to say yes to a supplier (which may form a verbal contract)	Yes	High	Has the formal responsibility for budget levels and commercial commitments of this size	To get the Decision Maker to actively drive the project as a priority and to commit to your solution over the competition	Find the head of the unit that benefits most from the solution if it's a proactive sale (or that person's authorised representative in a formal buying process)	*May be same person as the Approver, particularly in small companies e.g. with an owner-manager. The Decision Maker will change with each sale i.e. the answer to 'who is the Decision Maker?' depends on the buying decision being made
Influencer	Someone whose opinion on the decision counts and will have a bearing on the outcome	Normally no – influence tends to be informal but powerful	Depends on level of influence or sway this person has on the specific decision. Key (high) Influencers are hugely important to your success	Holds significant sway on whether the project moves ahead as a priority and / or which supplier will be chosen	To get the Key Influencers to actively support the project as a priority and to actively influence the choice of your solution over that of the competition	In a large sale find the top two or three key Influencers. Ask the Decision Maker and the Evaluator to find out who they are	Level of influence may change as the sales process progresses. May be outside the organisation e.g. consultant, business advisor

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Evaluator / Recommender	Someone who has been given the formal task of evaluating the alternative solutions for a stated need or a proactive proposal	Yes	Depends on level of informal influence	Has to have formal evaluation and recommendation responsibility by the Decision Maker	To get a more positive recommendation than all of your competitors	Make sure you get as much time with the Decision Maker as you do with the Evaluator wherever possible. You have to sell this to the Decision Maker.	Will often say he or she is the Decision Maker to maintain control of the selling organisations – in a formal buying process will act as a Gatekeeper. Also may be a group of people including authorised representation from the procurement function and/or specialist functions that deal with this type of work (e.g. training function for buying training) and user community (e.g. sales function when buying a sales training solution)
Gatekeeper / Blocker	The person who has the responsibility of keeping away time-wasting activities or people e.g. the Decision Maker's personal assistant or a functional specialist	No, unless you consider the Evaluator to be a Gatekeeper / Blocker	None normally, other than being able to give negative or positive feedback regarding your behaviour	Has to have responsibility for the diary of the Decision Maker	To motivate the Gatekeeper to give you access to the Decision Maker	Build a rapport with the Gatekeeper	Will often resist access to the Decision Maker
Users	People who have to operate or access the solution on a day to day basis	Sometimes involved in the definition of requirements capture or evaluation in any size of company	Depends on culture and style of the company i.e. either an inclusive and consultative approach or a 'closed-door' approach with users when choosing new suppliers	Has to have significant respect from and influence on the Decision Maker ('super-user')	To get a more positive recommendation than all of your competitors	Get the support of a 'super-user' (a user with a high level of influence over the Decision Maker). Treat as a Key Influencer	Be careful because it could be a waste of time or the best thing you ever did. If you get it right, they will champion the successful implementation and ongoing growth

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Champion	Someone who is willing to actively fight your cause from within the decision making process	Ideally yes	You need to make sure it's high!	Must be either the Decision Maker, Approver or a Key Influencer	To develop a Champion to actively sponsor the project and your sale	The Decision Maker should be the first choice to lock out the competition	Beware, a Key Influencer as a Champion can diminish in terms of influence over time in a long sales cycle
Mentor	Someone who is willing to give you guidance from outside the decision making process (if inside the decision making process then they become a Champion)	No, but may well have a vested interest in the outcome e.g. prefers you or your solution to the competitor's	Often low influence	Has to be trustworthy and well connected or well informed.	To gain insight from the Mentor into the decision making process (formal and informal) and the competitive landscape	Talk to previous owner or retired supplier and be prepared to buy lunch!	Only normally relevant when selling to a large organisation, but could be a previous owner or supplier to a smaller company. Keep talking to them but keep testing their information as it may be out of date!

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How to map out and leverage the sphere of influence for a buying decision:

If you are proactively selling a solution to a company:

1. Map out the external pressures acting on the organisation you're selling to
2. Determine the key internal pain points that these cause and the desired improvements that your solution will best satisfy
3. Identify who heads up the functions or divisions that will get the most benefit from your solution
4. Meet with these people and 'Sell from the Left[®]' to:
 - a) Get their active buy-in to an opportunity or project
 - b) Make them Key Influencers and one of them your Decision Maker (but test whether they have real authority to make purchasing decisions of the value that you are intending to propose)

If you are selling reactively in a formal buying process:

1. Map out the external pressures acting on the organisation you're selling to
2. Determine the key internal pain points that these cause and the desired improvements that your solution will best satisfy
3. Identify who heads up the functions or divisions that will get the most benefit from your solution
4. You can meet with these people and 'Sell from the Left[®]' to:
 - a) Get their active buy-in
 - b) Make these people Key Influencers who will champion your cause with the Decision Maker