

A close-up portrait of a young Black man with short, dark hair, smiling broadly. He is wearing a light blue button-down shirt. The background is blurred, showing what appears to be an office or public space with other people.

mentor

The Art of Being an **Optimistic Sceptic**

Why qualification is so important

As a mentor once explained to me, there is one key difference to make you stand head and shoulders above the rest. Here is what he said:

“Good salespeople qualify in, excellent salespeople qualify out”

James Barton

Using technology to make the complex simple to improve organisational wellbeing, productivity and performance



The Art of Being an Optimistic Sceptic

There is enormous power in positive thinking, but there's just as much power in being prepared for negative outcomes.

How do we as salespeople find the right balance, and what does that look like for us? Let's explore the art of being an Optimistic Sceptic.

Let that sink in for a bit... good people are looking to add opportunities to their pipelines, whilst excellent salespeople are busy removing opportunities from theirs.

When I first heard this, it was jarring and completely against everything I had been taught up to that point. As a salesperson, our job is to go out and find new opportunities and close them. Why on earth would I then be looking to get rid of those opportunities? Surely, the art of sales is persuading people to buy what you are selling?

Over time, when I sat and thought about it, I began to see the wisdom in what I was being told.

You see, the challenge with always qualifying in is that you end up with a large pipeline that needs constant management. You are busy calling around your opportunities and working through your task list in SFDC. Dozens of calls, emails, activities.

This takes you away from other important tasks; prospecting, having the quality time to speak with new people, building your reputation in the market through social media posting and thought leadership and managing your own destiny.

Instead, you become a slave to your pipeline... it drives you, and not the other way around.

What I have learnt over the years is that to be truly excellent in sales, you need to know when and where to apply your energy, and be confident enough to walk away if something isn't right with the opportunity.

This becomes increasingly difficult as the opportunity value increases or you get closer to the end of a quarter where you need to show results, but despite the temptation to keep things in, it is hugely counterproductive.

I used to work with a colleague who had this problem. I used to joke with him that he had 'happy ears'. Everything was an opportunity and most of the time it would close at a high value and quickly.

The reality, however, was that they never did. They normally took forever to close, and when they did, it was normally for a fraction of the original pipeline. They were very proud of their multi-million-pound pipeline and would often flaunt those numbers showing their success. Narcissism at its best...

I was quite the opposite, and I was told I had Eeyore (from Winnie the Pooh fame) ears. I was challenged for asking difficult questions and having a smaller sales pipeline.

When you looked at the numbers, my pipeline was probably 30% the size of my colleague's, but I closed 10x more in value. The numbers always speak for themselves.

There is, as you would expect, a balance to be struck, somewhere between Tigger and Eeyore.

As a salesperson, you need to have positivity and optimism, otherwise you will get nowhere fast and be jumping out of the window after the 10th rejection of the morning.

But, you also need to be a sceptic. You need to remember that what people tell you is unlikely to be 100% true and often they are simply telling you what you want to hear.

So, the balance is to become what I call the 'Optimistic Sceptic'. In other words, you need to have the ability to hold both optimism and scepticism in balance and be OK with the paradox it creates.

Our ability to qualify in this manner really does separate us from the crowd, and whilst it feels like it is going in the opposite direction, it is actually driving us towards more success.



That being said, good qualification is more important than what it means to us individually; it is actually a vital part of the sales motion and financial health of the organisation.

When we have a good-looking pipeline, qualified with happy ears, we are not showing the reality of the situation. Your pipeline is potentially hiding a timebomb that could be catastrophic to an organisation's planning.

Sales leaders use our pipelines to forecast revenue and forecast demand and therefore in some cases, forecast resource requirements (people, machinery etc.) Getting our forecasts right is an essential part of the business cycle and therefore our ability to qualify is at the top of this process.

“There is, as you would expect, a balance to be struck, somewhere between Tigger and Eeyore.”

So, how do we do it...

Well anyone who has been in sales for more than a week will be familiar with a qualification methodology of some description.

These could include:

- **MEDDIC** (Metrics, Economic Buyer, Decision Criteria, Decision, Process, Identify Pain, Champion)
- **CHAMP** (Challenges, Authority, Money, and Prioritization)
- **GPCTBA/C&I** (Goals, Plans, Challenges, Timeline, Budget, Authority, Negative Consequences and Positive Implications)
- **ANUM** (Authority, Need, Urgency, Money)
- **FAINT** (Funds, Authority, Interest, Need, Timing)
- **SCOTSMAN** (Solution, Competition, Originality, Timescale, Size, Money, Authority, Need)

These all have various levels of complexity and some are more suitable for transaction selling and some for complex enterprise sales.

However, ALL of them find their roots in the most simple qualification methodology of them all, **BANT**. This may be old and considered simple, but my evidence shows me that it's still the very best quick indicator of an opportunity and in line with the old Pareto principle:



of all opportunities can be qualified out this way.

(This is the Pareto Principle)



Now, when you compare this to the average forecast accuracy which is **46.5%**, it looks attractive.

[\(2018 Sales Optimizations Study\)](#)

Ok, so what's BANT about?

Often described as the 'Old Faithful', **BANT** stands for Budget, Authority, Need and Timeline. It was originally developed by [IBM](#) and at a high level asks four simple questions that can very quickly qualify an opportunity.

These questions are:

- **Budget:** Does the prospect have sufficient budget to be able to purchase?
- **Authority:** Does the prospect have sufficient authority to purchase?
- **Need:** Does the prospect have a pain sufficient enough that we can resolve in a purchase?
- **Timeline:** Is their sufficient evidence that a purchase is going to happen in the relevant timeframe?



If the answer to any of those is no, you need to seriously consider if the opportunity is real or should be qualified out so you can move on to opportunities that give you a better chance of winning.

Let's explore those areas a little more carefully.

Logically, you would start with the **B** of **BANT** to follow the acronym, but we recommend starting with the **Need** as this is why the customer would buy.

Need

If there is no recognised need or the pain is not a priority, this can result in wasted sales effort of a long sales cycle.

That is why we start with need to see if the customer wants change or not. Questions to consider here are:

- What is causing you the biggest challenge right now?
- What would happen if that challenge was resolved?
- What would happen if there was no change?
- What solutions have you previously considered?
- What has stopped you from resolving this before?
- What would it mean to you if we can resolve this? (this is looking for the personal win as well as the business win)

It is important to ensure you are talking to the right person when asking these questions. In essence, you want to be talking to the pain holder or one to two levels senior to them.



Budget

Budget can be tricky as there are lots of factors involved, and in today's world it gets even more complex when we consider **Opex** vs **Capex** arguments.

Here are a few questions you should consider asking your prospect:

- Is there a budget allocated to this need?
- How much is it? (you will be surprised how many people will tell you)
- When does your budget cycle run? (you may find that the budget is available but not until next year, or they need to spend the money in the next 3 weeks!)
- Do you prefer Opex or Capex?
- What other projects are getting funding? (this helps you establish the organisational priorities)



Authority

This is an area where **BANT** can be a little limited as it looks at authority one dimensionally, but as we all know, every sale has more than one stakeholder. In fact, [CEB/Gartner](#) have research showing that there are more than 11 people involved in any B2B sale. Therefore, it's important you take this into account.

Here are some questions that you should consider asking:

- Who else will be involved in the purchasing decision?
- Is this coming out of your budget? (This question can reveal who else is involved in the purchasing decision)
- Can you describe your normal buying process? (Reveals if things normally go through procurement, tender etc.)
- What objections to this purchase do you anticipate encountering? How do you think we can best handle them? (Reveals potential blockers that may be up or down the chain)
- Who else advises you on these sorts of purchases? (Often the informal network is critical to decision making, and these influencers are not always obvious)
- What will resolving this pain point mean to you personally?

Time

A critical area of **BANT** as this will also inform the priority and time commitment from you to progress the sale. If the timescale is too long, you can manage your time accordingly.

Questions to ask include:

- How soon do we need to get a solution in place?
- When are you hoping to realise the benefits of this solution?
- What would the business implications be should this be delayed?
- When are you ready to implement the solution?

BANT may be something of a blunt tool, but I still hold that 'Old Faithful' is the foundation of all the other models. Whilst others are more sophisticated and nuanced, **BANT** is still the quickest and simplest litmus test, and it remains your best friend as a salesperson.

Effective qualification is a critical skill, and the sooner we learn how to use data to drive our critical thinking, the better we are going to be at sales. The art of being an Optimistic Sceptic is to remember to hope for the best and plan for the worst. Most importantly, always be looking to qualify out, not in.



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