Tough Sell: Selling User Experience

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I have the luxury of working for a mature user experience (UX) organization. One of the benefits of working for such an organization is that we get to tackle a range of challenges not all organizations have the bandwidth to attack. In my case, the challenge was posed by my boss who asked, "I need you to figure out how to align with our sales force." I returned his request with a question, "I help develop product. I don't know a thing about selling it. Why is this a good idea?" His response was, "Our sales organization could benefit greatly by understanding how to position UX with customers, but they don't have a clue how to do it."

I figured that I had a graduate degree in UX and I had more than a decade of experience. How hard could this be? So I prepared a PowerPoint deck and a few articles spelling out a classic user-centered design process. I spiffed it up with a few nice process diagrams as well. I set a few appointments with some sales reps and got the bad news. "Yeah, I don't get this. Sounds too technical" and "This sounds like some kind of development speak. What is this 'UX' anyway?" I had completely missed the mark. Turns out, it was a lot harder than I thought, but also even more important than I had anticipated.

Why was it harder? Neither my graduate program nor my work experience had prepared me for this challenge. I had plenty of experience communicating with other UX professionals and had built the technical skill needed to do the same with developers. But talking to sales professionals? A whole new game. They spoke in the language of "competitive differentiators," "value propositions," "sales drivers," "cross selling," "up selling," etc. But language was the symptom of a larger cultural surprise. I became a UX professional because I wanted to make lives just a little better for the average user. I always viewed sales people as uninterested in that, their job was simply to sell the product and move on. Any concern they had for a "user" in my estimation was only a superficial interest to closing the deal. Boy did I have a lot to learn.

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Why was it more important than I thought? My boss was right. The sales organization actually could really benefit from positioning our UX message. He was also right, in that they needed help to do it as they lacked any knowledge of what we do or why we do it. Why was it more important? Because the more I connected with the sales and marketing organizations, the more I saw opportunities for UX. Opportunities to move our profession closer to the strategy table—to keep us relevant to the business, the bottom line, and ultimately the customers.

Learning How to Speak Sales: Step 1

So, I retrenched, rebooted, restarted. Step number one became clear. I had to unlearn my UX speak and learn to speak, think, and write like a sales rep. The biggest cultural divide was perhaps "my users" versus "their users." Sales reps sold to *customers*, I represented *end users*. In enterprise software, customers and end users are very rarely the same bird. Sales reps are focused on the person making the purchase decision, I was focused on the chap who had to sit in front of the monitor or tote the mobile device. Two different worlds, two different sets of concerns. In short, site visits with my users had not prepared me, as I had mistakenly hoped, to speak sales. Site visits had prepared me for understanding end users wants and needs, but not for learning how to position UX in a sales context for customers. In fact, I had learned to stay away from discussions about sales during site visits and often to be clear that a site visit was purely for user research purposes. However, I knew that I needed to get back to customers not end users to understand how to truly position our profession meaningfully. I needed to do my homework, and I needed to do it by using what I knew—user-centered design methods.

First I set about identifying the user profiles relevant to our sales organization, i.e., their customers. I slowly learned that the dimensions relevant to positioning UX meant understanding customers'

- purchase motivations,
- career aspirations,
- technical sophistication,
- previous relationship to our company, and
- organizational relationships within their own company.

Second I learned that I needed to identify the main messages the sales organization already used with customers. That meant learning to speak "value propositions" (e.g., this product will save me money), "competitive differentiators" (e.g., our feature X provides greater capabilities), and "proof points" (e.g., our product has won ABC industry award). This meant stripping out content that focused on extensive discussion of user research methodologies, it meant re-positioning content in terms of how it directly benefitted customers, and it meant taking a whole new perspective on my company's competitors.

Drawing from this insight, my task was to create a whole new set of messages around UX, but with a voice that customers could understand. One of the first things I did was to hire a professional writer who was used to "de-teching" techies like me. I took advantage of the downturn in the news industry; a highly qualified news reporter for a major newspaper was on the market. She and I worked together to figure out how to translate what I knew academically to something that spoke to customers. For example, when I said, "We used user-centered design methods to improve the user interface," she suggested, "we used customer research to develop the enhancements your end users need today." The following were my biggest lessons learned from her:

- Don't over-communicate the UX methodology. Yeah, we love process, but customers are only mildly interested, if at all.
- Drive the value of UX home for customers; focus on the result that customers' organizations will gain from the improved usability/user interface. Will staff be more productive? Will they reduce the number of calls to their support desk? Will they reduce the amount of time and money spent training end users?

- Understand and have talking points ready for your sales reps that address customers' concerns about UX and the user interface. Not multi-page manifestos, but quick, one page briefs that given some easy common questions and answers.
- Speak with pictures. Ultimately, sales reps understand user interfaces because reps are (generally) visual people. Providing pictures assists sales reps who need to communicate quickly and visually with customers.

Finally, I usability tested these messages with customers. Working with a senior usability engineer on my team, we conducted user research directly with customers, not end users, at a variety of user group events. The final outcome? This time around, we'd hit it out of the park, but not without serious effort and not without a whole team working together to pull it off: copy writing, visual design, usability testing, etc.

I was not done, however. I knew I needed to refine, refine, refine. I shared my new slides and talking points with customers to continue to sharpen the message. I leveraged an externally facing website, blogs, user group's presentations, and our company trade show as venues for connecting with customers and getting feedback.

I learned the importance of measuring the impact of my efforts. Sometimes, it was remarkably difficult. In the case of user experience that is definitely true. User experience is not a product per se, and so it is difficult to measure its impact on sales. But I was able to measure click counts on external web pages, find relevant YouTube videos, and find testimonials in blogs. This kind of information was influential when I approached the sales organization about uptaking my content.

With this experience, I started to carry the message back to the sales reps, but I had to position my content in a way they could value. I had created content that connected with their customers, but now I had to create a story that would connect with a sales rep. My story had to feature impact: to the bottom line, to sales dollars, to the placement in the sales cycle, to reduced support dollars, and to a beneficial long-term relationship with my company.

Learning How to Speak Sales: Step 2

One very illuminating detail I'd learned along the way was one of perspective. I had my "I represent the user and so have a higher mandate" perspective; sales reps had another one and it was just as oriented toward people as mine. One rep explained her perspective this way, "My focus is on the guy or gal who runs the IT shop. And my goal is to make them as successful as possible with our product. Why? Because most of our customers [read: purchasers] have bet their careers implementing our technology. They've had to sell the purchase to their management, and it's their professional reputation that's on the line if any part of the process goes haywire." That was the first time I'd thought about sales in a particularly human way. They are user centered but their users are different from mine.

Given my previous experience sharing my UX content with reps, i.e., highly unsuccessful experience, I knew I had to have some proof to regain credibility. I actually put together a few before and after slides to demonstrate how my content had been modified. I also used customer testimonials on the new content itself to show that "yes, in fact, this message does resonate with customers." My first goal was simply to get some reps to use our content during the sales process. At this point, I also brought in my heavy artillery, a colleague of mine who spent a lot of time in the field talking with customers. I had him review the new content and help me refine it further.

Learning How to Speak Sales: Step 3

I was excited about my new found skills. I had finally figured out how to speak "customer" and "sales." Grammar, spelling, and punctuation. Utterly satisfied with my performance on this project I quickly uploaded all of my documents to an internal website for sales reps…and waited. I waited for the sales reps to email me about how great the collateral was and could I give them more. I waited a while. And a while longer, and a while longer. Next lesson? If you build it, you must promote it, like any good marketeer. So taking a lesson from the sales reps themselves

and all of their customer channels, I realized I needed to communicate my content to our sales organization. This meant a new round of conversations and user research to discover:

- There are internal newsletters that are closely held by certain individuals that go out to an army of sales reps. Promotional blurbs in these kinds of communications led to feedback like, "Hey this customer testimonial about the usability is awesome, do you have anything more like this?"
- There are key sales reps who are real influencers and, to use Malcolm Gladwell's term, "connectors." Get them on board with your content, and you will get another 20 to 100 people to follow.
- Key personnel inside the company had blogs that the sales reps read. Offering to write a guest blog meant more awareness of my content. Also, comments on the blog told me if I was gaining traction.
- Once the reps start to see value, you will likely start to get executive interest. Be prepared for that—and be ready to respond with a message of your own about the importance of user experience to the sales and marketing of your product.

Conclusion: Success

Then comes the curse of success. Once sales reps know that you can offer a competitive differentiator, expect them to knock on your door. Some rules of the road if you want to maintain your momentum:

- Deliver when asked, even if it's a short deadline (it will be).
- Take guidance. If they suggest simplifying your message, do it.
- Be a team player. UX professionals sometimes have resources or skills that the sales and marketing guys don't—don't be afraid to offer your services in tight spots or in strategic ways. For example, if you have design skills and you notice some of their slides could be improved, offer to help tweak the deck a bit.

Perhaps you too may find yourself embarking on a sales and marketing field trip. My biggest lesson learned is that you don't need an MBA to be successful. Rather, you need an anthropology degree. What I mean is that you will be traveling to a foreign land and learning a foreign culture; listening skills and a healthy dose of humility are required.

The best way to start your expedition is to check any UX moral superiority at the door. I know, I know you may say, "But that's NOT ME. I don't feel morally superior." All I ask is that you keep my recommendation in mind on the off chance that it should occur. Remember, at the end of the day, these guys and gals play an important part in why you have a pay check.

My final comment is that this kind of a journey is a stretch for some UX professionals. It really does not suit all of us. In fact, you might be turned off by this kind of task, and that's OK. For those of you who try it, it can be rewarding and a great career expander. You will have added a new skill to your repertoire, and you will likely have professional connections with new parts of your business that you never knew existed.

About the Author

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