A TRANSFORMING SALES RESULTS EBOOK

How to Choose and Implement a Sales Methodology That Delivers Results.

Selecting a methodology and implementing it are two different decisions.

The **CoNavigator** Method™ | B2B Sales Mastery

Two things must be true

Two things must be true before a sales methodology helps you. It must be good, meaning it gets results. And it must be right for the way you sell and your buyers buy.

Those are two separate questions. Most evaluations ask them as one. A team sits through four presentations, forms an impression, and picks a winner. One verdict. Afterward, nobody can say which of the two questions it actually answered. When adoption stalls at 35% a year later, the diagnosis starts from scratch.

This applies whether you're licensing a commercial methodology, building your own, or deciding whether to keep what you already have. The third case gets the least attention and probably deserves the most.

01

Is it any good?

Quality. Judged by exploring the content, not by a presentation.

02

Is it right for us?

Fit. Judged against your motions, your model, your buyers, and your deals.

WHY THIS, FROM ME?

Built five. Implemented ten others.

Almost everything published about how to choose a sales methodology comes from someone who sells one. That includes this. So the criteria you evaluate against ought to be yours. Take what's useful here and throw out the rest.

Implemented for employers and clients

- Strategic Selling
- Conceptual Selling
- Large Account Management Practices (LAMP)
- Professional Selling Skills
- Professional Sales Negotiation
- Account Development Practices
- Command of the Message
- Command of the Sale
- Selling With Insights
- Socratic Selling
- MEDDPICC (a qualification method, not a methodology)

Built

- Sales Fundamentals (Household Finance Corporation)
- Partnership Selling (NovaStar Mortgage, Inc.)
- Selling With Insights (Richardson Sales Performance)
- Modern Sales Foundations (SPARXiQ)
- The CoNavigator Method (Transforming Sales Results)

Plus twelve Top-Performer Analyses over sixteen years, studying what the best sellers do differently from everyone else.

A QUICK DEFINITION

Process and methodology aren't the same thing

YOUR SALES PROCESS

The what and the when

Stages, tasks, exit criteria, and the sequence buyers move through.

YOUR SALES METHODOLOGY

The how and the how well

The frameworks, models, and skills your sellers use to execute inside those stages.

Process without methodology gives you consistent activity and inconsistent quality. Methodology without process gives you skilled sellers moving in different directions. You need both. This guide is about the second one, and about making it stick.

Part 1

The Fit Questions

What's true about you

Work through these with your leadership team before you look at anyone's materials, and before you start building your own. A vendor presentation shows you what a methodology does well. It's a showcase. Your job is to know what you need it to do.

FIT QUESTION ONE

How do your sellers go to market?

Four broad motions. Each asks something different of a methodology, and most companies run more than one.

Selling what buyers already know they need

The buyer has defined the requirement and is choosing a vendor.

Deals are lost on price, or before they started.

Needs: Fast qualification, shaping decision criteria, real negotiation.

Problem-solving to find the best fit

The buyer knows something is wrong but not the root cause.

Deals are lost to no decision.

Needs: Discovery depth, root-cause work, business-case help.

Co-creating with mixed engagement

Nothing off the shelf fits. Your people, theirs, often a partner.

Deals are lost to scope drift, or a commitment your delivery team can't keep.

Needs: Multi-party work, mutual plans, clean handoffs.

Creating opportunities with insight

The buyer isn't looking. Nothing is broken as far as they know.

Deals are lost to the status quo.

Needs: A real point of view, cost of inaction, executive access.

FIT QUESTION TWO

How is your sales force organized?

Your sales model limits what any methodology can reasonably ask of a seller.

- SDRs and BDRs feeding AEs, or full-cycle reps who prospect for themselves
- Account managers holding and growing existing revenue
- Ecommerce and self-serve taking the transactional volume
- Products you ship versus solutions you implement, which changes the whole post-sale motion

THE TEST

A methodology that assumes one seller owns the relationship end to end will need real adaptation in a segmented model with three handoffs.

That isn't a dealbreaker. You just want to find it during the evaluation instead of in month four.

Then estimate two numbers for each motion: the share of revenue it produces, and the share of your sellers' time it consumes. When those diverge sharply, understand why before you buy anything.

FIT QUESTION THREE

Who Sells What to Whom and How

WSWTWAH. You say it wis-wit-wah, and it started as a way to get smart quickly about a client's business. It turned out to do more than that.

- It cuts down the assumptions on both sides
- It shows you where your own leaders see the business differently from each other
- It gives everybody a common language for the conversation

Run it on your own company first. If your leadership team can't answer it in a paragraph, you aren't ready to evaluate anything. And if two of your leaders answer it differently, you've found something more urgent than methodology selection.

WHO sells
WHAT to
WHOM and
HOW

FIT QUESTION FOUR

How do your buyers prefer to buy?

This gets skipped almost universally, which is strange, because Buyer Acumen is the foundation for everything you do. It means knowing your buyers deeply: their roles and goals, their personas, how they're measured, their budgets and purchasing authority, their buying process and decision criteria, and how they define value. It also means knowing what COIN-OP covers: the challenges they face, the opportunities they can capitalize on, the impacts of the status quo, the needs their situation creates, the outcomes they want, and the priorities of those needs and outcomes.

Some want to self-educate
and talk to a seller late

Some want a guide
from the first conversation

Some run a formal committee
with documented criteria

Some decide over lunch
and paper it later

Some are risk-tolerant
and move quickly

Some need three references
and a pilot before anyone signs

If you haven't done this research, do it before you evaluate anything, or you will be guessing at fit. If you have, hold it up against the methodology. One that front-loads seller involvement won't fit buyers who want space. One built for a formal committee will feel like overhead to a buyer who decides fast.

FIT QUESTION FIVE

What shape are your deals?

Every answer tells you something specific about what the methodology has to be able to do. Think about your typical opportunity first, then separately about the ones that matter most.

■ **How many decision makers and influencers, and do their interests compete?**	One or two wants efficiency. Six or more needs consensus building, not just stakeholder mapping.
■ **How big is the problem you solve, in the buyer's terms?**	Small problems don't survive heavy process. Large ones need quantified impact and a defensible business case.
■ **What's the price point, and what does it set in motion internally?**	Above signature authority you have added finance, procurement, legal, and sometimes a board.
■ **What's the risk to the buyer of getting this wrong?**	When risk is high, your real competition is doing nothing. You need proof, pilots, and a clear implementation path.
■ **How hard is the decision itself, apart from the money?**	Sometimes options genuinely look alike. That calls for helping the buyer build criteria.
■ **How long is the cycle?**	Short cycles need compression. Long cycles need memory, requalification, and a record that survives a change of rep.
■ **How complex are the problems your products solve?**	Tangled problems need business acumen and diagnostic skill. Product training doesn't substitute.

Take those seven answers together and you have a requirements list. Now you're evaluating against something.

FIT QUESTION SIX

What does your customer lifecycle actually look like?

Your methodology should cover every stage your sellers work, with nothing left uncovered. Complete means something different at every company.

Company A	Company B	Company C
New business development, opportunity management, and account management. Needs all three covered well.	A wholesale distributor. Nearly all revenue comes from existing accounts. Prospecting content is mostly decorative.	Marketing and an SDR team create all pipeline. Sellers never prospect, but opportunity management and negotiation demands are heavy.

All three need complete coverage, and complete looks nothing alike across the three. Map your lifecycle first, in the proportions you actually run it, then check any methodology against your map instead of a generic one. Something that touches every standard stage but goes shallow where 80% of your revenue lives isn't complete coverage for you.

BEFORE YOU GO FURTHER

Write down your fit profile

Six answers. One page. If your leadership team can't fill this in without arguing, that disagreement is more urgent than the methodology decision.

Our dominant go-to-market motion is ____________________

Our sales model is ____________________

Who sells what to whom and how ____________________

Our buyers prefer to buy by ____________________

A typical deal has ____________________

Our revenue concentrates in ____________________

Keep this page beside you for the rest of the guide. Every quality question that follows is only answerable against these six answers.

Part 2

The Quality Questions

What's true about the methodology

These are hard to assess in a conversation, because a vendor presentation is built to answer a different question. Ask for the materials and read them.

THE FASTEST TEST

If your methodology training materials accidentally fell into your buyers' hands, what would they think?

Would you be mortified? Or proud?

If you would be scrambling to explain the section on creating urgency, or the language about controlling the conversation, or the tactics for getting past the gatekeeper, you already know what you bought.

Your buyers never see your methodology.

They experience it in every conversation.

Is it modern, buyer centric, consultative, value focused, and outcome oriented?

Five words that sound like marketing until you make each one testable.

Modern

It reflects how buying works now. Buying committees have grown and buyers self-educate through most of the journey. If a methodology assumes the seller controls the flow of information, it's describing a world that stopped existing.

Buyer Centric

It's organized around the buyer's journey, not the seller's steps. Read the stage names. If every stage is something the seller does, it's organized around the seller, however it's described.

Consultative

The seller diagnoses before prescribing, surfacing the buyer's challenges, opportunities, impacts, needs, desired outcomes, and priorities through collaborative dialogue, then custom-fitting the solution to what they found. If a seller could have written the proposal before the first meeting, nothing consultative happened.

Value Focused

Value is defined as what the buyer gets, in their terms, and the methodology teaches sellers how to find out what those terms are. If value is a fixed list of your product's benefits, that's a benefits list.

Outcome Oriented

The whole thing points at results the buyer wants, and holds that thread from discovery through implementation. If discovery uncovers outcomes and the proposal talks about deliverables, the thread broke.

QUALITY QUESTION TWO

Is it built on communication skill, or is it a technique library?

This is the most important question in this guide, and it's the one nobody asks.

A technique library

An inventory of moves. A way to open a call. A move for getting a meeting. A sequence for handling a specific concern. Plenty of those inventories are good, put together by people who could genuinely sell.

- Techniques are motion-specific. One built for a single-decision-maker deal misfires with nine stakeholders.
- Techniques decay. Buyers learn to recognize them. The move that felt insightful in 2009 is a punchline now.
- When your motion shifts, or a seller moves segment, half the library goes dark.

Advanced human communication

Empathy that's actually empathy. Listening that changes what you say next. Inquiry that helps the buyer think more clearly, whether or not it helps you. Ethical intent as a design constraint.

- Nobody gets tired of being genuinely understood.
- Nobody catches on to real curiosity and starts resisting it.
- It works the same way in a three-week deal and a three-year one.

A methodology built on communication skill will outlast a technique inventory, however good those techniques were when they were written. Communication skill holds up when your motion changes, your market changes, and your buyers get sharper. Specific moves don't, and a seller who has the skill can come up with the move. It doesn't work the other way around.

WHAT THE DIFFERENCE LOOKS LIKE

Hand each of these to a new rep

A technique-based discovery approach

Gives the seller a checklist (what to do)

- Ask what their biggest challenge is.
- Ask what happens if they don't solve it.
- Ask what it's costing them.
- Ask who else is affected.
- Ask about timing.
- Provide a tip for what to say if they claim there's no budget.

A communication-based discovery framework

Teaches situational fluency (how to think)

- Acknowledge what the buyer just said before asking the next thing. Reflect with empathy.
- Clarify anything ambiguous. "Peel the onion" to get to the root.
- Confirm you got it right.
- Follow the buyer's thread instead of your own list.
- When an answer comes back vague, slow down and find out why instead of moving to the next question.
- Use a framework like the Situation Assessment with COIN-OP (Current state: challenges, opportunities, impacts; Future state: needs, outcomes, and priorities).
- Collect the information to validate that you can help. When you can, gather what you need to help them build a business case.

One will ask five questions and write down five answers. The other will have a valuable business conversation.

QUALITY QUESTION THREE

Does it teach sellers to think, or just to execute?

Playbooks aren't the problem. Rote execution is. A methodology can rest on sound principles and still produce sellers who run it the same way in every stage, with every buyer. That's hard to spot in an evaluation, because heavy prescription looks like rigor. It's reassuring to a leader worried about consistency. And it caps your reps at competent.

Buyers can tell. They disengage when a conversation feels formulaic, and they don't trust someone who sounds like they're reciting something.

THE TEST

Hand a seller a situation the materials don't cover, which is most situations, and see whether the methodology has given them any way to reason about it.

You know the phrases

And so do your buyers.

- "Would you be completely against..."
- "Would it be unreasonable to consider..."
- "Is there anything stopping us from moving forward today?"
- "Who else needs to be involved in the decision?"
- "That's exactly why I called you..."

None are old-school arm-twisters. They're just overly familiar, and they label you as a salesperson trying to get your way.

Does it flex without breaking?

Very few sales forces sell just one way. A distributor runs counter sales at a branch, inside sales takes inbound inquiries, and an outside rep navigates twelve-person buying committees for a $500K solution, all within one company. The question isn't whether a methodology handles complex sales. Most good ones do. The question is whether it compresses to work in other situations.

A rigid methodology

Asks all of its questions every time.

Sellers don't misapply it. They quietly stop using it. A good seller who can tell that a full consultative sequence would be ridiculous at a service counter simply won't run it, and won't mention that to anyone.

You spend a year diagnosing an accountability problem that's really a range problem.

An adaptive methodology

Asks similar questions at very different depths.

In a simple sale, discovery compresses to a few well-chosen questions, and the heavier analysis and business case aren't needed. In a complex sale, the same discovery expands into a full multi-stakeholder situation assessment with COIN-OP.

Same logic, different depth, and a seller who learned it once can run it at both ends.

I call this The Accordion Principle. Ask to see how a methodology handles both. "Walk me through this in a 10-minute counter conversation. Now walk me through it in a $500K deal with a 12-person buying committee."

QUALITY QUESTION FIVE

Was it derived, or was it invented?

Every methodology came from somewhere, and there are usually three "somewheres."

Derived	Invented	One career, written down
Studied what top performers do differently from everyone else. Observed, documented, tested, and codified. That's the strong version, and it's rare, because the work is slow and expensive.	Reasoned out from theory into a model that makes logical sense and has never been checked against what actually produces results.	A very good seller captured what worked for them, in their industry, with their product, against their competitors, in their era. Sometimes genuinely valuable. Also a narrower base than it looks.

There's a real tradition behind the first one. Learning International ran major global research studies to build Professional Selling Skills. Neil Rackham's team studied thousands of sales calls and produced SPIN Selling. Both were built the hard way, and both showed their work. Those two studies are what got me started running my own Top-Performer Analyses.

ASK TO SEE THE DERIVATION

Then evaluate the answer

Five questions do most of the work.

01	**How were top performers identified?**	Quota attainment by itself is noisy. Territory quality, tenure, inherited accounts, and product mix all move that number without saying anything about skill. Ask what they controlled for.
02	**Compared to whom?**	This separates real research from a survey. Without a comparison group of average performers, you learn what salespeople do. You only learn what top performers do differently when you have something to compare against.
03	**How was the data collected?**	Observation, call analysis, and win-loss review beat self-report. Top performers are unreliable narrators of their own success.
04	**How many, over what period, in what settings?**	A dozen conversations at one company in one industry is a useful anecdote. It isn't a research base. You want to know which one you have.
05	**What's been revised since?**	Buying has changed. A body of research from 2006 that hasn't been revisited is a historical document.

Case studies and logos answer different questions. Results tell you it worked somewhere. The derivation tells you why it should work for you.

QUALITY QUESTION SIX

Do the parts feed each other?

Open it up and look at the seams. What discovery produces should be what qualification uses. The outcomes a buyer describes early should show up in how value gets framed later. When a concern surfaces in month four, the seller should be able to go back to work they have already done instead of starting over.

This is the failure mode of the mash-up, and mash-ups are everywhere. Content lifted from three copyrighted methodologies, mixed with material from four books, plus tips collected over the years from a dozen sources. Every piece might be sound on its own. None of them were designed to talk to each other.

There's also copyright exposure in lifting content from commercial methodologies, which is a conversation for your legal team.

WHO PAYS FOR IT

The seller

Integration becomes their job, in real time, in front of a buyer. The strongest 10% will manage it. Everyone else picks the two or three pieces they like and drops the rest.

The manager

When every seller runs a different combination, managers can't inspect execution consistently. They can't separate a skill problem from a deal problem, because there's no standard to compare against. Forecasts turn into a collection of opinions. Then we complain about how few sellers make quota. Your managers can't coach that. It isn't on them. It's the system they were handed.

QUALITY QUESTION SEVEN

Can your managers coach and inspect it?

A methodology that can’t be observed can’t be coached. If it can’t be coached it won’t reach the adoption levels that produce results.

Look for observable behaviors

Not attitudes, not mindsets, not “understands the buyer’s business.” Things a manager can see on a call recording, in an opportunity plan, or in a CRM record, and score consistently across a team.

The practical test

After training, can a frontline manager describe what good looks like at a specific stage, in behavioral terms? If your best manager can’t tell a rep exactly what was missing from a discovery call, the methodology has given them nothing to coach with.

Common language is the other half of this.

When everyone means the same thing by the same word, pipeline reviews get shorter and more honest, coaching starts at the actual problem, and a rep moving to a new manager isn’t starting over. Common language only exists if there’s a common methodology, but not every formal methodology delivers it. Some are abstract enough that two people can use the same term for weeks before they notice they meant different things.

QUALITY QUESTION EIGHT

Can you implement it at your complexity level?

Some methodologies are detailed enough and complex enough to be genuinely hard to implement, and that difficulty suppresses retention, application, adoption, and mastery. Depth you don't adopt is worth nothing.

Be careful how you measure it, though, because the obvious proxy is often wrong. The volume of content isn't the variable. Structure and delivery are. A methodology broken into small modules, sequenced over a quarter, with an hour or two of work a week, spaced repetition, practice, and manager reinforcement can carry real depth and still land. The same content delivered as a two-day firehose and a binder won't survive the drive home.

Ask:

- Is it learnable, adoptable, and sustainable at the scale of your team?
- Will your reps want to take it, and will they actually learn from it?
- Is it performance-based, teaching reps what to do on the job?
- Does it space the learning out, make people recall it, and support using it on the job?
- Does it engage frontline managers to learn it, reinforce it, and coach to it?
- What's the time commitment, week by week, for a seller carrying a number, and what results will offset the investment?

75%

Set an adoption target before you start, and make it a real one. I use 75% as the floor, based on research.

Below that you don't have a methodology. You have a preference that some of your sellers share.

Part 3

Making the Decision

Putting the two halves together

You now have two lists that don’t talk to each other yet. Here’s how to make a decision out of them.

STEP ONE

Turn your answers into must-haves and nice-to-haves

Not everything you wrote down carries the same weight.

If 70% of your revenue comes from account expansion	Deep account management coverage is a must-have and prospecting depth is a bonus
If your deals average nine stakeholders	Consensus-building is a must-have, not a nice-to-have
If your sellers run two motions	Adaptive range moves from nice-to-have to non-negotiable

Six to eight must-haves is about right. If you have fifteen, you haven't prioritized. You've inventoried.

Score candidates against your list, including the one you're already running. Most companies have never scored their current methodology against anything.

STEP TWO

Watch for the two failure patterns

High quality, low fit

It gets adopted by the people whose deals it happens to match, and ignored by everyone else. Your adoption data will read as an accountability problem when it's really a fit problem.

Detected in months.

High fit, low quality

It gets adopted broadly and doesn't change your results. This is the more expensive failure, because it takes far longer to detect. Everyone is using it. Nothing is moving.

Detected in years.

A methodology that scores high on quality and low on fit fails visibly and quickly. One that scores high on fit and low on quality fails slowly, and those failures cost more.

STEP THREE

Run the cheapest test available

Compare the methodology to what your own top performers already do. Twelve Top-Performer Analyses consistently surfaced a top band of roughly 4% who sold measurably differently from everyone else. You probably employ some of these sellers. Sit in on their calls, or pull their recordings, and compare what they actually do against what the methodology teaches.

01

It describes what your best people already do

You've found something worth adopting, and you have internal proof to show the skeptics.

02

It contradicts them

Either the methodology is wrong for your market, or your top performers are winning for reasons that won't scale. Find out which before you spend anything.

03

It teaches things they don't do but obviously should

The strongest case for buying it, because you've identified a real gap. Rare, but it happens. Occasionally the top performers are the fastest of the slow horses.

Your job as a sales or enablement leader is to figure out which methodology is going to work best when it comes to executing your sales process with your ICP and personas.

Score every candidate the same way

Including the one you already run, which most companies never have. Weight must-haves at double.

Score 1 to 5		A	B	C
FIT	Covers our dominant motion			
FIT	Fits our sales model and handoffs			
FIT	Matches how our buyers prefer to buy			
FIT	Handles our typical deal shape			
FIT	Covers our lifecycle where our revenue lives			
QUALITY	Buyer-centric, and we'd be proud to show it			
QUALITY	Diagnoses before prescribing			
QUALITY	Built on communication skill, not techniques			
QUALITY	Teaches judgment, not recitation			
QUALITY	Runs at both ends of our deal range			
QUALITY	Derived from research with a comparison group			
QUALITY	The parts feed each other			
QUALITY	Our managers can coach and inspect it			
QUALITY	We can implement it to 75% adoption			

A SUMMARY YOU CAN USE

What to avoid, and what to do

What to avoid	What to do
▪ Free-for-all and mix-and-match approaches	▪ Use one aligned, formal methodology
▪ Overly complex frameworks that slow execution	▪ Prescribe best practices for buyer interactions
▪ Choosing without checking fit	▪ Align seller actions to the buyer's journey
▪ No clear buyer focus, centered on seller steps	▪ Make it scalable and repeatable across teams
▪ No common language across teams	▪ Enable data-driven pipeline and forecasting
▪ Rolling out without an adoption plan	▪ Provide a common language for coaching
▪ One-size-fits-all across segments and deal types	▪ Keep it adaptable without losing core integrity
	▪ Cover your customer lifecycle completely
	▪ Integrate with your sales process and CRM

A SUMMARY YOU CAN USE

What to avoid, and why it hurts

What to avoid	
Free-for-all and mix-and-match approaches	No two sellers describe their process the same way, and everyone's numbers get explained by territory. It's impossible to coach or inspect, and often a copyright question for your legal team.
Overly complex frameworks	Watch the third month, not the first. Heavy frameworks look fine during rollout and then decay. If a seller has to think about the framework while they're in front of a customer, it's too heavy for that moment.
Choosing without checking fit	The signal is an evaluation team that can describe someone else's model in detail and can't describe their own go-to-market motion in a paragraph. If Part 1 was hard to answer, that's the work to do before you shortlist anyone.
No clear buyer focus	A methodology centered on seller steps produces sellers running a process at buyers rather than with them. Buyers can't always name it, but they feel the difference, and it shows up in access, candor, and how much they tell you.
No common language	The tax is small and constant. Every handoff loses something, and every pipeline review spends its first ten minutes establishing what actually happened. It's invisible on any report you run, which is exactly why it persists.
Rolling out without an adoption plan	The most common way a good decision produces nothing. Part 4 is about this.
One-size-fits-all	It gets used where it fits and abandoned everywhere else, so your adoption data reads as an accountability problem. Check whether compliance would have made sense in the deals they were working.

What to do, and how to check

What to do	
Use one formal methodology	One. Chosen deliberately, documented, and shared. The research on adoption levels is unambiguous.
Prescribe best practices	Not principles to interpret. Actual guidance on discovery, qualification, value conversations, resolving concerns, and gaining commitment. Two competent sellers should run the moment the same way.
Align to the buyer's journey	Every stage should answer where the buyer is and what has to be true before they'll move forward. If you can read a stage description and not know what the buyer is doing, the alignment is cosmetic.
Make it scalable and repeatable	What works in your strongest region should survive a new-hire class and a reorg. If it only works when your best people run it, you've documented talent rather than built a methodology.
Enable data-driven forecasting	It should produce stakeholder maps, decision criteria, business cases, and exit criteria as a byproduct of good selling. That's what makes a forecast a forecast instead of a poll.
Provide a common language	Same words, same meanings, from the SDR floor to the QBR. Test it by asking three managers to define the same term without conferring.
Adaptable, with a stable core	Flexibility without a stable core isn't a methodology. A stable core without flexibility gets abandoned in every deal that doesn't match the template. You need both.
Cover your lifecycle completely	Yours, mapped first, with the depth concentrated where your revenue comes from.
Integrate with process and CRM	The methodology has to live where the seller works. If applying it means opening a different document, adoption caps out early.

Part 4

Implementing It

Choosing well is the start, not the finish

A well-chosen methodology gives you a fighting chance. That's all it does on its own. It doesn't train anyone or change any behavior. The work after the choice matters as much as the choice.

WHY BOTHER

Adoption is the whole game

The research firm CSO Insights measured what happens as more of a sales force actually uses its process and methodology. Adoption here means the share of sellers genuinely using it, not the share who sat through training. The result is a staircase, and most organizations have never seen these numbers.

Adoption Rate	Revenue plan attainment	Quota attainment	Win rate
Under 25% adoption	97.6%	49.4%	40.4%
76–90% adoption	106.7%	64.0%	54.1%
Over 90% adoption	112.5%	72.4%	57.8%

At greater than 90% adoption you aren’t just beating average. You’re operating in a completely different performance tier.

WHAT IT COSTS YOU TO NOT DO THIS

The gap, in dollars

A directional model, not a financial audit. The assumptions are shown so you can substitute your own.

27 sellers, the average for a mid-market firm

43% of sellers hit quota today, per RepVue

72.4% quota attainment at above-90% adoption

7 to 8 more sellers hitting quota, from system change alone. Not from adding headcount.

What's your CFO's threshold for a business case worth funding?

YEAR ONE INCREMENTAL REVENUE

$50M company	**$8.6M**
$100M company	**$17.2M**
$250M company	**$43.1M**

And this is conservative. It excludes lower turnover, shorter cycles, larger deals, and the compounding in years two and three.

THE TOP BARRIER TO ADOPTION

Nobody checks whether anything changed

59%

of respondents in ATD's 2019 State of Sales Training report named the same barrier:

"Salespeople aren't held accountable for applying skills learned in training."

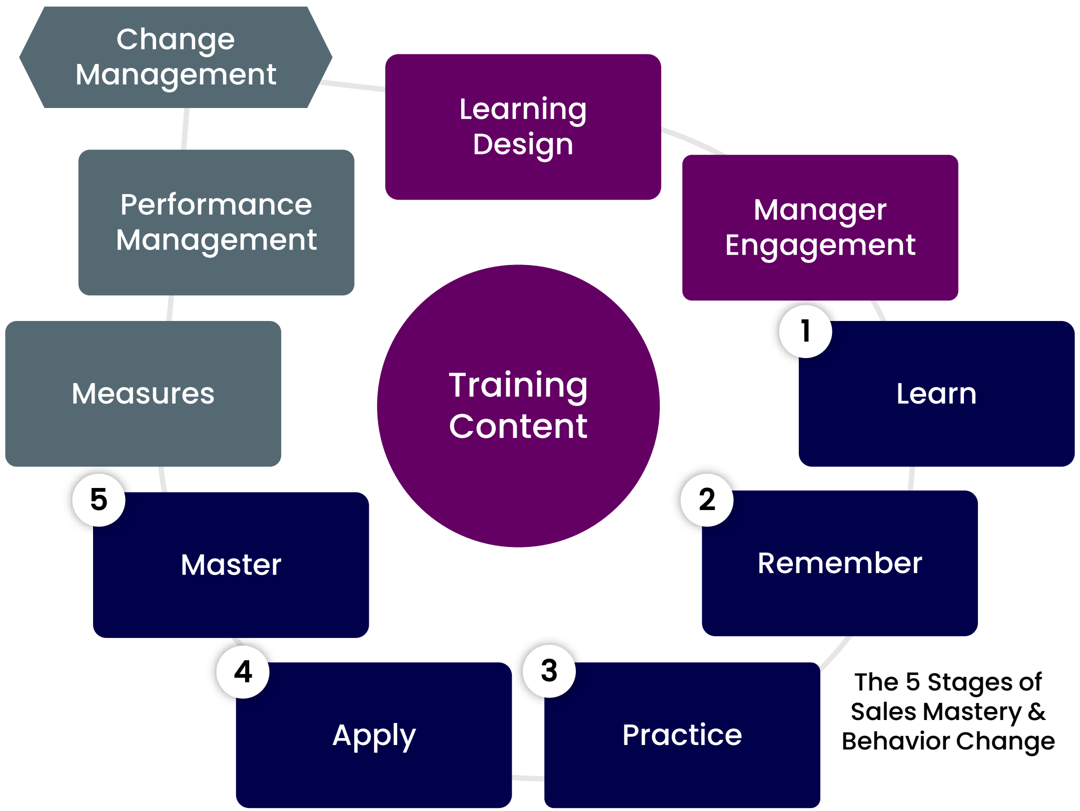
It was 50% in 2016. It moved in the wrong direction.

Companies buy the methodology, run the training, and then nobody checks whether anything changed.

It gets talked about for a while. Long term, the methodology fades.

The Sales Training System

Three phases. Miss one and the chain breaks.



Prepare for Change

- Ensure that your training content will get results
- Design a great learning experience
- Engage, enable, and empower frontline sales managers

Guide the Change (Five Stages)

- **Learn:** Train the content, validate learning occurred
- **Remember:** Sustain the knowledge
- **Practice:** Develop skills (practice with expert feedback loops)
- **Apply:** Transfer and apply skills on the job
- **Master:** Coach to mastery over time

Cement the Change

- Get metrics and measures in place
- Manage to behavior and performance expectations
- Lead and manage the change until it cements in the culture

PHASE ONE

Prepare for change

Fail to plan and you plan to fail. Most of what determines the outcome happens before anyone is trained.

Top-down support

Start with executive sponsorship. Not a name on a slide. A leader who will ask about it in their own meetings, all year.

Communication

Communicate the why and the what-is-in-it-for-me. Kotter says overcommunicate by a factor of ten. Cascade the message with support for each layer.

Stakeholder management

Navigate the landscape. Identify and cultivate champions. Identify and manage detractors, before they do it for you.

Manager engagement

Train frontline managers first, so sellers return to an office where their manager is ready to help them translate what they learned.

Managers are the single biggest variable in whether any of this survives, and the group most often trained last.

THE STEP MOST PROGRAMS SKIP

Enable managers first, not last

Companies invest in seller-facing training and assume managers will figure out the coaching piece on their own. They won't, at least not consistently.

01

Managers work a section ahead

They complete the modules for a whole section over two weeks, before their sellers see any of it.

02

Managers meet with the instructor

Content questions get answered, and they get comfortable with the guide they'll use to lead their own team's sessions.

03

Sellers take the training

One to three modules a week, on the schedule you set.

04

Managers run the review sessions

Weekly, using the guide. This is where the content gets translated into your deals, by the person who owns the outcome.

Research firm CSO Insights compared managers who coach to a defined standard, on a set cadence, tailored to each rep, against managers left to their own judgment. Win rates ran 55.2% against 41.8%, and quota attainment landed 21.3% above average. That doesn't happen by accident.

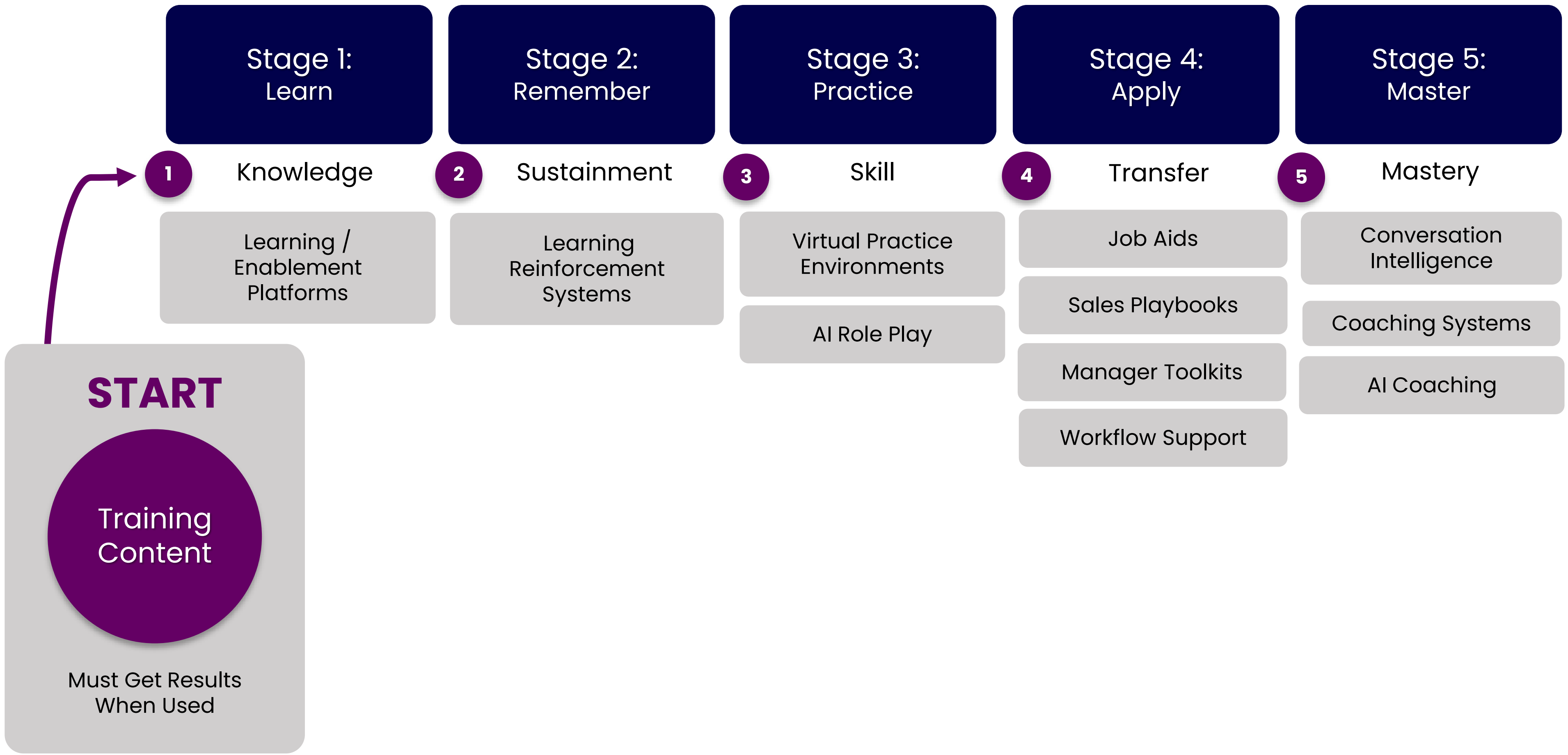
PHASE TWO

Guide the change: Five Stages of Sales Mastery

STAGE	**Stage 1:** Learn	**Stage 2:** Remember	**Stage 3:** Practice	**Stage 4:** Apply	**Stage 5:** Master
WHAT	Acquire the knowledge behind the skill with examples and assessments/tests to validate learning.	Sustain the knowledge; reverse the "forgetting curve."	Develop and practice skills. Convert knowledge into behavior.	Apply the newly-acquired and practiced skills in the workplace.	Guide and coach reps to skill mastery and performance outcomes, over time.
HOW	eLearning, Classroom Instruction (FTF or Virtual), Assessments	Q&A, Check-Ins, Assessments, Learning Reinforcement Systems	Flipped Classrooms, Role Playing, Live Simulations, Virtual Coaching Tools	Mentoring and Preparation to Use Skills, Forms/Job Aids/Performance Support	Sales Analytics, Field Training and Coaching, Coaching Forms and Tools
WHY	**Learn something new.** Known to work. What, Why, & How. (Maybe When & Where.)	**Don't forget.** Just because they learned something, doesn't mean they'll retain it.	**Develop skills.** Just because they know and remember, doesn't mean they can do it.	**Apply skills.** Just because they can do it, doesn't mean they will. (Skill/Will Matrix)	**Achieve mastery.** Just because they tried it, doesn't mean they did it well or will continue.

One example, using what you probably already own

Not a shopping list. Most companies already own several of these and aren't using them for this purpose.



Embed it where the seller already works

Training events fade. Binders collect dust. What sticks is what lives in the daily workflow. When a seller opens an opportunity record, the methodology should be right there, guiding the next conversation and flagging the gaps.

Into your CRM

Discovery notes, qualification criteria, and exit criteria, meaning what has to be true on the buyer's side before a deal moves on, with a way to confirm it happened. Plus who's who in the account, captured where sellers already work.

Into the weekly rhythm

Call planning, meeting prep, and post-call reviews. Pipeline reviews and forecast meetings that ask about the work, not just the number.

Across functions

Marketing, product, customer success, and operations reinforcing the same practices across the buyer journey.

When enablement technology is integrated into CRM rather than sitting beside it as a point solution, quota attainment runs 6.8% higher than average and win rates 4.1% higher. It also means sellers aren't doing CRM work that's separate from selling work, which is most of why CRM hygiene is bad.

This is how you reach adoption above 90%. Not by mandating it. By making it the path of least resistance.

PHASE THREE

Cement the change

Adoption that isn't measured and managed decays. This is the phase most implementations skip, and it's the one that separates a lift from a memory.

01	**Get metrics and measures in place**	Define your leading and lagging indicators before you launch, not after. Adoption rates, win rates, quota attainment, revenue plan attainment, sales velocity, and coaching activity quality are all measurable. Track them consistently. Adjust quarterly.
02	**Manage to behavior and performance expectations**	Inspect the behaviors, not just the numbers. A low result tells you where. Only the behavior tells you why.
03	**Lead the change until it cements in the culture**	Until it's simply how the work gets done here, it's still an initiative, and initiatives end.

BEFORE YOU LAUNCH, NOT AFTER

Measure what matters

Define your leading and lagging indicators before the first session, and set the adoption target you're managing to. Track consistently. Adjust quarterly.

Leading

- Process and methodology adoption rate
- Coaching activity, and its quality
- Worksheet and CRM field completion
- Manager review sessions actually held

Lagging

- Win rate
- Quota attainment
- Revenue plan attainment
- Sales velocity
- New-hire ramp time

Leading indicators tell you whether the change is happening. Lagging indicators tell you whether it worked. Track only the second set and you will find out too late to do anything about it.

- **What gets asked about gets focus.**
- **What gets measured gets done.**
- **What gets integrated into workflow gets adopted.**
- **What gets coached gets mastered.**
- **What gets mastered moves the needle.**

Read them in sequence and you have the whole implementation roadmap in five lines.

ONE MORE PAGE TO KEEP

The implementation readiness check

Run this before you sign anything. Every unchecked box is a known risk you're accepting, which is different from a surprise.

- [ ] An executive sponsor who will ask about this in their own meetings, all year
- [ ] A documented charter: vision, goals, strategy, roadmap, and who owns what
- [ ] A buyer-aligned sales process for the methodology to live inside
- [ ] Frontline managers trained before their sellers, with a support guide
- [ ] A delivery design that drips: small modules, spaced, with practice and feedback
- [ ] CRM fields, exit criteria, and prompts built before week one
- [ ] Leading and lagging indicators defined, with a named owner
- [ ] A stated adoption target, at or above 75%
- [ ] Accountability with teeth: what happens when the work isn't done

Nine boxes. If you can check seven, proceed. If you can check four, fix the plan before you buy the program.

CLOSING THOUGHTS

Two questions, checked separately

Answer the first one before anyone's materials are in front of you, with your go-to-market motions, sales model, buyer personas, deal shapes, and real customer lifecycle written down. Answer the second one by reading, because the vendor presentation is built to answer different questions.

- Ask the mortified-or-proud question about the materials
- Ask to see the derivation, and ask what they compared top performers against
- Ask to see it run at both ends, the counter sale and the committee deal
- Ask what it teaches a seller to do in a situation it doesn't cover
- Go watch your own top performers before you decide anything
- Then plan the implementation with as much care as you planned the selection

The evaluation is going to happen either way. The only real question is whose criteria you walk in with.

I build and sell a sales methodology

The CoNavigator Method™ | B2B Sales Mastery

Rather than ask you to take my word for anything, here's mine run through the same criteria, as one worked example of what the answers should sound like.

Derived, not invented	The CoNavigator Method came out of twelve Top-Performer Analyses over sixteen years, comparing the top band against everyone else across multiple organizations and industries. Not theory, and not my own selling career written down.
Communication skill as the foundation	The models sit on top of advanced human communication, because the techniques age and the communication doesn't.
Internally connected	What discovery produces is what qualification uses. What qualification confirms is what the value conversations build on.
Adaptive range	The models expand and contract with the complexity of the deal while the core stays intact. The same method supports a counter sale at a branch office and a twelve-person committee evaluating a $500K solution.
Implementable	Twenty-six modules across four sections, which sounds like a lot until you see the delivery. Thirteen weeks, one to three modules a week, roughly one and a half to three hours of a seller's time per week.
Managers first	Managers meet before the sellers do, sit in every workshop, and get coaching points at the end of every chapter to use in the one-on-ones and pipeline reviews they already run.

ABOUT THE AUTHOR

Mike Kunkle

Mike Kunkle is an internationally recognized expert on sales enablement, sales effectiveness, sales coaching, and sales management. He has spent more than thirty years helping companies drive revenue growth through proven sales systems and enablement strategies.

He is the author of The Building Blocks of Sales Enablement and the creator of The CoNavigator Method, which spans B2B Sales Mastery, Sales Coaching Mastery, and Sales Management Mastery. All three are available now as training programs. The first book in the series, The CoNavigator Method for B2B Sales Mastery, releases in Q4 2026, with the other two following in 2027.

He also publishes Sales Enablement Straight Talk, a newsletter with more than 34,000 subscribers.

The **CoNavigator** Method™ | B2B Sales Mastery

Powered by *Transforming* SALES RESULTS™

Let's talk it through

Thirty minutes, bringing whatever data you have on how your team is performing. The goal is to work out what's actually limiting growth, which sometimes turns out to be something training won't fix. If so, I'll tell you.

conavigatormethod.com

mikekunkle.com

linkedin.com/in/mikekunkle