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Identifying and Managing the Buying Center

Charles Fifield, MBA

The buying center is comprised of various individual influences that shape the buyer’s purchase decision. With many simple purchase decisions, these various influences are usually few in number. On the other hand, when making larger purchase decisions such as an automobile or a residence, or in business decision-making, the influences can be numerous and sometimes quite diverse, causing the decision-making process to be complex and cumbersome.

Since a successful selling process is about enabling the buyer to make a quality purchase decision, understanding how to productively manage the buying center’s influences and efficiently guide the decision-making process can be critical to the final buy or no-buy outcome. Selling has been said to be about developing and delivering a story in which the buyer is the key character or hero. The buying center is much like a good novel’s cast of characters. Successfully working the buying center is an artful process requiring multiple selling engagements.

Managing a typical buying center requires four key steps:

1. Identifying the buying center’s makeup and organizing it in the form of a working matrix.
2. Mapping a strategy to effectively and efficiently work through the buying center to the desired end in mind, i.e., a win-win purchase decision.
3. Executing and improvising as needed to achieve the buying decision working in a making it easy-to-buy mode and implementing as agreed.
4. Planning follow-up meetings for performance reviews, prospect and reference building and future buying opportunities.

Identifying the Buying Center and Composing the Buying Center Matrix

The buying center is comprised of individual influences that serve what can be termed meaningful roles in the decision-making process.
### Buying Center Participants

<table>
<thead>
<tr>
<th>Role</th>
<th>What They Do</th>
</tr>
</thead>
<tbody>
<tr>
<td>Initiator</td>
<td>Recognizes a need or a problem that can be improved or resolved by acquiring a product or service.</td>
</tr>
<tr>
<td>Gatekeeper</td>
<td>Controls the flow of information and access to buying center members, and usually executes the purchased product or service order.</td>
</tr>
<tr>
<td>Users</td>
<td>Utilizes or consumes the product or service.</td>
</tr>
<tr>
<td>Technical Influencers</td>
<td>Consults regarding technical issues.</td>
</tr>
<tr>
<td>Financial Influencers</td>
<td>Consults regarding financial issues.</td>
</tr>
<tr>
<td>Decider</td>
<td>Makes the final yes or no decision.</td>
</tr>
<tr>
<td>Champion</td>
<td>Advocates for the seller within the purchasing organization (typically from the purchasing organization).</td>
</tr>
<tr>
<td>Coach</td>
<td>Advises the seller regarding buying-center issues and personalities (typically from the purchasing organization, but absent from the buying center).</td>
</tr>
</tbody>
</table>

Oftentimes, certain buying center members will perform more than one role. Also, for whatever reason, certain roles are oftentimes absent from a particular buying center. To clearly identify the individuals serving in the buying center, early in your buyer-seller engagement, the salesperson should inquire with the appropriate buyer representative, who is usually the gatekeeper, as to who will be involved in a decision-making process and their responsibilities or roles. This inquiry is often termed the buying center confirmation, and embodied in it are five pieces of necessary information:

1. Who are the members of the buying center and their roles?  
2. How do they foresee the buying center operating step-by-step? (Note: At a minimum, know what will be the next step.)  
3. What is the timing for making a purchase decision?  
4. What are the key attributes of the product or service to be acquired?  
5. If available, what are the budget considerations?

When formulating the make-up of the targeted buying center, it is best to begin with the standard set of roles and then identify the person or persons who will serve each role versus starting with individual names and then attempting to assign roles. In addition to the roles and names of parties serving those roles, it is critically important to develop each participant’s projected wants. These can be business or financial in nature, but oftentimes buying center members are more concerned about personal risks or relationship values. A decider’s primary want could be very
different from a user’s or technical advisor’s want. It is imperative to gain a clear understanding of what each member wants (and why) versus needs. This information will prove critical as the salesperson interacts with the buying center. The information gained should be transferred to a matrix as follows:

**The Buying Center Matrix**

<table>
<thead>
<tr>
<th>Roles</th>
<th>Name(s)</th>
<th>Want(s)/Key Attributes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Initiator</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gatekeeper</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Users</td>
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<td>Coach</td>
<td></td>
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</tr>
</tbody>
</table>

In the context of even a relatively small residential real estate transaction, a buying center could easily include the following players:

- The initiator(s)
- A gatekeeper
- User(s), including children and other relatives who may be living with the buyers
- Local lending institutions who may become lenders
- Inspectors
- A title company
- An attorney
- An appraiser
- The decider(s)
- A coach for technical or relationship reasons
- A champion who could pave the way for fewer challenges
For a real estate agent to work efficiently and effectively with this broadly-based group, it is imperative to develop a long-term working relationship with most of these center members, including the local lending institutions, inspectors, title companies, attorneys and appraisers. By so doing, an agent’s attention can be better focused on the short-term buyer variables, including the gatekeeper, the users and the deciders.

**Mapping a Purchase Decision Strategy**

The next step in our managing the buying center process is to develop an execution strategy. In any organization, there is naturally an order or priorities to the buying center’s decision-making process. These may be functional in nature or simply driven by personality factors. Certain individuals or interests need to be addressed before others are to be considered, i.e., putting first things first to prioritize the required interactions. This is much like sequencing the tasks and developing a critical path within project management formulations. For example, if specifications or technical reviews are required before a purchase decision can be made, it would be best to very early in the engagement have a groundbreaking dialogue with those center members, especially if these individuals represent a new relationship. If there are certain center members who have a particular focus of dissatisfaction, then it is best to gain a clear understanding not only of what members are looking for in a purchase decision, but also why. Emotions are a strong basis for change decisions being implemented and these need to be defined as well as properly positioned as you progress through the buying center.

**Executing and Implementing the Strategy**

When moving through a buying center toward the purchase decision, the seller must be continually selling each member. One disinterested or turned off buying center member can ruin months of worthwhile planning and execution. As a result, many salespeople like to employ a divide-and-conquer strategy to minimize common relationship entanglements when working with a group of buyers. Also, champion or coach input can often help to identify and overcome foreseeable challenges.

To minimize complications and delays, the seller should be anticipating the constraints or barriers to achieving a successful purchase decision. Too often, the buying process becomes a series of stress-building and disjointed activities versus a more seamless experience. The buying process should be designed to achieve the buyer feeling as though the purchase decision-making process was emotionally easy to execute.
Follow-up Meetings for Performance Reviews

The acid test of business is customer satisfaction. Career-minded sellers must think long-term and should plan performance reviews with key buying center members shortly after every buying decision has been implemented to assess how well they met the expectations of others. If these meetings prove positive, then the sellers should be prepared to gain the openers/validators to future success stories through testimonials, referrals and references earned.

If the meetings prove negative, then a significant learning opportunity has been seeded. The only sustainable long-term competitive advantage is one’s ability to learn faster than the competition, and these follow-up sessions with disgruntled buying center members are invaluable learning opportunities.

Conclusion

Identifying and managing the buying center is a key element to effectively and efficiently guiding a buyer to a win-win purchase decision outcome. First, identify the center’s players and their roles. To perform this task, a matrix format is suggested to minimize errors and oversights. Then the salesperson must gain insight into the individual center member’s wants and whys in order to achieve a more productive or successful outcome for all. Next, the road to success must be strategically mapped out. This mapping out process to achieve the desired result could be viewed as similar to what you see when a football coach draws up a winning offensive play using Xs and Os, and it always indicates achieving success when executed. Lastly, the salesperson should, more often than not, be thinking long-term. Therefore, post-purchase performance reviews with key members of the buying center offer not only an opportunity to cement a productive relationship, but also a significant learning opportunity and fertile ground for obtaining referrals for future success.
About the Author

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Chuck Fifield is a Senior Lecturer for Baylor University’s Hankamer School of Business, Marketing Department and serves as the faculty coach to several Baylor Sales teams. He joined the faculty at Baylor University in 2001, teaching in the Graduate Business School (Operations Management), the Management Department (Negotiations and Conflict Resolution) and the Economics Department (Principles of Macroeconomics). Chuck has taught or guest lectured at other Texas-based Universities in the fields of sales, international business, money and banking and finance/investments. Professor Fifield has conducted sales research and training for several organizations, including most recently State Farm Insurance. Prior to joining Baylor, Chuck was a financial consultant for nearly thirty years to businesses located throughout the U.S. He owned and operated several financial service businesses in the fields of securities, real estate, oil and gas and insurance.