

The Seven Ages of the Salesperson

Many of us when first entering into a new banking sales role, are coming into an existing highly charged organisation where emotions and activity can run high. Relationships have been established and our respective expectations are not necessarily in line with what is realistically attainable. Business schools and degrees don't prepare you for dealing with such issues and crises and the consequential emotional roller coaster that accompanies it. Nor does it prepare you for the many behavioural types you will be expected to deal with; sometimes under difficult circumstances during your sales career. We cannot offer advice on how to avoid the different issues because many are unavoidable and form part of your individual learning process, but we can provide instruction and advice on how to approach them, to minimize them or resolve them altogether.

"...getting ready is the secret of success." — Henry Ford

"All the world's a stage, and all the men and women merely players, they have their exits and entrances, and one person in his time plays many parts, his acts being seven ages."

Shakespeare, in his play 'As You Like It' describes the seven ages of man – the stages which we all go through from birth to death; likewise, we believe, with any professional salesperson, they will go through a parallel cycle of experiences through his or her career.

Thus, we are borrowing from Shakespeare's seven ages of man from which we segment the salesman's life as it unfolds into its respective stages.

"The infant salesman" seeks to recruit a mentor for guidance.

"The schoolboy" must learn how to do the job internally and externally.

"The lover with a woeful ballad" struggles with the barrage of problems every organization presents.

"The bearded soldier" must be willing to challenge him or herself and overcome the personal and organisational limitations.

"The general" must become adept at negotiating the politics within the organisation and implementing strategies for their progression.

"The statesman" is hard at work preparing to pass on wisdom in the interests of the organization.

And, finally, "the sage" embraces the role of mentor to young salesmen and women.

One way we can try to learn about salesmanship is to look at each of these development stages in terms of a continuous process and issues that are typical to each. The purpose of this is that as salespeople go through their individual transitions in their careers, each will bring new issues and challenges. However, most are predictable and knowing what to expect can help you individually get through more successfully and perhaps emerge stronger. As an organisation the stages also introduces elements of understanding and planning to retain talent with a view to develop better approach to senior management progression and future leadership planning.

Nor would we recommend one tries to avoid them, since dealing with each one from part of your experience and dealing with the challenges of each stage prepares you inextricably for the next. However, having a better understanding and conception of each stage can improve the salesperson's planning, their future performance and come through more confident and in a stronger position to plan the final stages of ones sales career.

"There is no failure except in no longer trying." — Elbert Hubbard

However, before we begin the 7 stages in more depth you may find it useful to gain an understanding of the basic building blocks that constitutes the learning and development process. The intention here is not to try to decipher and give guidance between the various models that have been developed over time but rather explain a simple existing and well researched frame work of reference as foundation to the seven stages. Further information about this can be found in appendix 1.

"All this will not be finished in the first 100 days, nor will it be finished in the first 1000 days, nor in the life of this administration, nor even perhaps in our lifetime on this planet. But let us begin" — John F. Kennedy

And so we move on to the first parallel stage of Shakespeare's infant, "mewling...in the nurse's arms".

1. The infant salesman

For the first period a young man or woman begins the long road of becoming a salesperson, the first experiences may seem daunting, mysterious and even frightening. Few resort to mewling, but may wish or would certainly benefit from the equivalent of a nurse, someone to help them solve problems and guide them through the myriad of initial required responses to gain a foothold of acceptability within the organisation and within their client base. The parallel here is where the conscious person would seek out mentors within the proximity that can help with how to respond to the barrage of different needs, requirements and interpretations to discern between the barrages of new disparate information hitting them.

Most banks do not formalise a mentoring culture so it is up to each individual to find "Champions" for each knowledge aspect, be it product, salesmanship or understanding the culture of the organisation like do's and don'ts and the political landscape that will form part of forming the person's future success.

This is a critical formative stage for the new recruit as the perception of the basis for corporate values, beliefs, ethos, and levels of cooperation from the organisation is established to become the foundation of how the person will in later stages link with their own values, beliefs and ethos. At this point, the overriding need is to conform and the person is willing to compromise on a number of fronts to fulfil the basic need for approval and survival but as we will discuss later, any misalignment will fester and grow into potential disillusionment leading to lack of commitment and move from the firm. The initial confidence levels are established and as mistakes are made they are subsequently highly dependent of how the organisation reacts and deals with such issues.

2. The schoolboy salesman, with shining face

The first sales experiences can be agonising education. We are not clear of what creates success or why we sometimes fail in our tasks. We now have additional responsibilities in terms of delivering and performing tasks. We also start to understand some of the relationship drivers that created our initial sales successes and internal support groups.

Your “honeymoon” period is coming to an end and you start to be scrutinised for differentiating traits and cognitive biases. Your need to conform is still overriding but you start to question some decisions that you initially accepted that now, compromise your personality. Your friendships are maturing and you get more comfortable in seeking associations outside the immediate support and peer group.

You seek and start to gather personal intuition from market intelligence that form your individual sales style. Your initial shyness and reticence to voice opinions begin to decline as the need for expressing yourself increases.

3. The lover, with a woeful ballad

As the combination of learned and acquired skills and experiences start to make cognitive sense. More product knowledge and client requirements start to raise barriers in terms of what the organisation can efficiently deliver.

This could be an area of intense frustration as our client responsibilities have increased to a level where we are no longer in the junior ranks but rather the firm and our superiors now start to stretch us to assess our capabilities.

Our initial confidence is high, and if over-high will generate excessive expectations in what the firm can reasonably deliver, both in terms of products & quality but also in terms of personal compensation.

Within this stage, managing realistic perceptions is paramount as the link has not yet been established to the longer term aspirations. The focus is on the “now” and to maximise the opportunities within the firm. At this point the individual may start to recognise their “transfer value” and evaluate alternative firms that better “fit” with their personal beliefs and perceived client requirements. Also, the ego has now developed to a stage where attention from other firms is viewed as confirmation of self worth and value, even as peer comparative. With certain ego, other forms of status differentiation such as by title and company perks become an additional evaluator for how the firm views the salesman.

4. The bearded soldier

This is the stage where we can begin to draw a line between the person who can continue to develop his or her career or become what we alternatively can term the “strategic warrior”. This individual has recognised their limitations either in terms of capability, aspirations or personal choice. This individual will now form part of growing number of people that retrench into additional and “hide” within the organisation by being steady performers but with limited upside or opportunity for development. It is an organisational challenge to motivate and encourage these types of individuals to grow or change with the firm.

For our “soldier”, now approaching the peak of his or her performance is now beginning to maximise the revenue potential from the client relationships they manage. The personal maturity is defining the person and their position as they recognise that to continue to make progress within the organisation new skills and political alliances need to be acquired and established.

As this stage, risk is that the person starts to “eat their platform” in terms of focussing their efforts in dealing more with existing clients rather than trying to create new clients for the firm by leveraging their experience. Also, if their personal aspirations have not been met, new levels of cynicism and ego validation can reappear in more sophisticated forms as their political skills are being challenged by others in the peer group.

This is therefore a critical planning stage for the organisation as this is the level where the firm has maximised their investment in the individual and the individual is maximising their value for the firm in terms of both economic and embedded knowledge. This is however a career defining stage and if the individual is moving into a low profile “strategic warrior” position, the firm need to coach and manage the future aspirations and job capabilities to avoid business stagnation and peer/colleague frustrations.

5. The general, full of wise saws

Having defined their longer term aspirations within the firm the tactical implementation can start to show. Within this stage, the person will try to leverage and flex his or her position to “stretch” the management willingness to redefine their role by trying to add responsibilities beyond pure client production. Also, the political strategies are starting to show to them and the management whether they are “on track” or “off track”. The individual will challenge more from the firm and this can be highly valuable to move “status quo” when well directed.

The individual driver here is that to move forward they need to take additional risks and seek challenges to generate the necessary changes. These additional risks when mismanaged can sometimes cause additional frustrations between the person and the organisation as planning mismatches occur. It is therefore paramount for the firm that to retain a valuable employee that a long term career plan is discussed in depth.

6. The statesman, with spectacles on nose

This stage is focussing on creating lasting personal value in terms of passing over lower margin accounts to other sales colleagues and concentrating on higher value business. Here, divisional responsibilities by region or products are given and the management style, skill and approach thereof are constantly challenged. Mentor and other leadership roles are taken on board to create further advancement opportunities and new skill requirements therein need to be identified and addressed. Client production is now peaking but often with fewer high value clients and mainly to show by example how successful sales are made.

7. The sage, second childishness

Within this stage, the person consciously delegate further production responsibilities and focus on helping with client development and mentoring. They try to maximise their position into where they can leverage their now mature and considerable client experiences and organisational “know how” to make business happen for the group. The focus can become if unchecked almost entirely internal as the external client focus has shifted to solving problems and overcoming hurdles internally. The personal value is now almost entirely dependent on the new skills and ability to “adding oil” to the production machine. This can be the stage of new personal career discovery as the new role either fit or not with their true value and belief system.

The firm’s ability to manage this stage is critical as the person now is almost entirely by value embedded within the firm and will feel vulnerable if the firm is not clearly and concisely planning and signalling the requirements for future career progression in line with their aspirations.

As we are now in the realm of fulfilled confidence and unconscious competence and we can potentially see more relaxed and competent approach to the workplace. New values such as work/life balancing may become important and an almost “second childishness” as Shakespeare called the final stage of man can be expressed without repercussion or fear of losing corporate respect.

“That man is a success who has lived well, laughed often and loved much; who has gained the respect of intelligent men and the love of children; who has filled his niche and accomplished his task; who leaves the world better than he found it, whether by an improved poppy, a perfect poem or a rescued soul; who never lacked appreciation of earth’s beauty or failed to express it; who looked for the best in others and gave the best he had.” — Robert Louis Stevenson

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References

William Shakespeare

Harvard Business Review, January 2004

A fresh understanding of function development, Dario Nardi, November 2003

Appendix 1

Carl Jung identified four functions: sensing and intuiting as ways to focus attention, and thinking and feeling as ways to make decisions.

Jung also observed that functions develop in an introverted or extraverted attitude. The result being a total of eight function-attitudes.

Isabel Myers later developed and described a sixteen type patterns. The essential conclusion was that we each have a dominant function and an auxiliary function to provide balance – everyone does perceiving and judging, introverting and extroverting

Organic Growth and Development

We can all relate back to some specific childhood memories, and when thinking about the past we often find that we can surprise ourselves in that we were very much like we are now, but less so. That is, the essence of our personality was present from the start and we are still discovering new aspects that form our perceptions all the time. Many functions we performed in childhood, from building sandcastles to playing children's games created the formative basis of understanding logical relationships, for example making a foundation and thicker lower walls for our sand castle to withstand the ravages of time and shifting sand. When we for example played Cowboys and Indians, we formed our cognitive understanding how to interact with friends and foe and created our sensing abilities to judge right from wrong.

These functions today are of course highly expanded and have become more sophisticated and informed but in essence remain very similar to our "sandpit" experiences. It seems we always and continuously engage in our functional preferences between sensing and intuiting to focus our attention, thinking and feeling to make our decisions filtered through our introverted or extraverted attitude.

These experiences are not surprising since human beings are living systems and as such are constantly evolving and maturing. We can say that the whole process is an organic development and as such is usually a gradual process, sometimes punctuated with growth spurts, but always within a whole.

The life cycle of a tree is therefore is a good metaphor were each "stage" of the tree's lifecycle reflects something unique about the tree at that time in its development.

Stage	Tree	Tree's special qualities	A person
0	Seed	A potential tree with genetic instructions for development, heavily reliant and formed by its immediate environment	Embryo
1	Sprout	Life emerges and grown in both directions but is still connected to and nourished by the seeds ability to exploit the environment	Child
2	Sapling	Beginning to harden and take final shape but still soft and pliable and easily shaped by the development around it	Youth
3	Adult	Now taking full shape and can bear fruit/seed. Stronger and harder to withstand changes to the environment	Adult
4	Mature	Age and character showing, now with history and a clear role and position (meaning/purpose) and dependents in its environment, and has withstood tests of time	Senior

The stages have significant overlaps. For example, there will be a specific time when a tree can bears its first fruits, but that fruit is usually small and inedible, a sort of trial period for things to come. The change into the adult tree with plentiful tasty fruit can take years and is by definition no certainty.

Following this simple metaphor, our function-attitudes do not “switch on” automatically in sequence at specific ages. Rather, each sequence has its own functional development pattern. For example, there is a “concrete” (primitive, early) and “abstract” (sophisticated, later) version of each function-attitude. Each function has a “passive” and “active” mode. And engaging a function can result in a “product” in the outer world as well as a mental event. As a person develops a function, he or she tends to engage it in a way that is more abstract, active and sophisticated.

However, the whole pattern is present and operating from the beginning. An individual as a whole will only mature with experience and time. And also, each function-attitude will continually manifests itself in new and for us sometimes personally, in intriguing ways.

The lifecycle of a function-attitude

Stage	The experience and response to a function-attitude
0	No cognitive awareness, conscious usage or direct development
1	We experience the function in its instinctual or concrete form; we try to block out, explore, or fixate on the experience; its engagement is rough or child-like.
2	We accept and follow a social/cultural version of the function, or we passively follow the functional process; we are in its grip; its use is rigid or adolescent
3	We "grasp" the function in its many forms; we question, alter, personalize and make it our own, as a tool with many options; its use is complex and flexible.
4	The function is highly differentiated and well-integrated; using it contributes back to the world in a unique way; its use is purposeful, creative and generative.

Finally, this approach fits with a common matrix that describes 4 stages of learning:

<p>Unconscious Incompetence (stage 1)</p> <p>Most aspects of any process outside our awareness - we do not even know what we are missing. We may arrange our lives to avoid engaging in the process or inadvertently project negative aspects of the process on to others. Progress in this area is mainly due to "beginner's luck" using it.</p>	<p>Conscious Incompetence (stage 2)</p> <p>We become aware of what the areas are for improvement but we use the process awkwardly but we do not understand the process from a wider perspective. We often inappropriately either over, under and mis-use the process. Often used in service of another leading process.</p>
<p>Conscious Competence (stage 3)</p> <p>We selectively focus attention and choose what aspects of the process will be most effective, often knowing just the right way to engage the process for success. Aware of how to link the process to other processes. Sometimes over-bearing.</p>	<p>Unconscious Competence (stage 4)</p> <p>All aspects of the process are seamlessly integrated with other functions, enabling the process to lead from the background through other processes. We flow with effortless results by creatively breaking the "rules" of the process.</p>