The Changing Buyer

What a recent survey of BTA dealers found

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I recently presented a breakout session at BTA IGNITE Kansas City, "The Information Imbalance: How to Sell to Today's Younger, Better-Informed Buyer." Before my presentation, I conducted a survey of BTA member dealers. Forty-eight respondents answered 15 questions about how their buyers have changed and what their businesses have done about it. This article provides an overview of what I learned. You can download the full report at www.bta.org/ChangingBuyerReport.



The picture is consistent. Dealership leaders are confident in their sales organizations and have not had occasion to measure whether that confidence holds. They estimate that buyers arrive at the first conversation far less decided than buyers themselves report. When results fall short, the response is usually the same — more activity. And the changes most dealerships have made in response to shifting buyers were to their websites.

None of that is a failure of attention. Most of it is what happens when an industry that learned to sell in one market finds itself operating in a different one, and when the part of the process that changed is the part no one inside a dealership can see. Everyone is measuring the new buyer, but almost no one is asking whether the sales organization was built for the old one.

The six findings from the survey:

(1) Ninety-eight percent of respondents rated their sales team a three (out of five) or better at selling to buyers under 45. Seventy-eight percent of owners have never measured whether win rates actually differ by buyer age.

(2) Fifty-two percent believe half (or less) of the buying decision is made before a salesperson gets involved. Buyers report that four times out of five, they have already settled on a preferred vendor before ever speaking to one.

(3) Every sales leader who responded named access as his (or her) biggest obstacle with buyers under 45. Not price, not competition, not product — getting in front of the buyer at all.

(4) When sales results disappoint, 78% of owners push harder on accountability and activity. None change compensation or who they hire.

(5) When asked what changed in response to buyer behavior, 40% named marketing or the website — four times any other structural answer. Not one respondent named the comp plan.

(6) Hiring is the number-one concern of owners, at 59%. Not one sales leader uses a structured assessment to do it.

Who Answered

The bullets below show who answered the survey, that group's number of responses, its percentage of total responses and its rating of its sales team:

- Owner, president or CEO: 27 responses, 56% of total responses, 3.81 rating of sales team
- Service, operations, admin: 8, 17%, 3.12
- Sales leadership: 7, 15%, 4
- Salespeople: 3, 6%, 3.67
- Other (COO, sales support): 3, 6%

Two things about this sample are worth stating. First, it describes leadership rather than the dealerships' workforces. The survey was designed to compare what leadership believes about today's buyers against what sales team members experience in the field. Members were asked to forward the survey to their salespeople twice and only three salespeople responded. Where sales team responses appear in this article, they are directional only and labeled as such.

That shortfall itself is worth noticing. A four-minute request, sent through the association twice, reached leadership, but did not reach the field.

Of the people answering:

- Eighty-three percent were 45 or older and 46% were 60 or older.
- Seventy-one percent have worked in this industry for more than 25 years.
- Forty-four percent run dealerships making less than $5 million in revenue; 31% are making between $5 million and $15 million.

This is an experienced, long-tenured group, which is a strength. This is also worth keeping in mind when reading answers about a new market.

Finding One: Confidence Without Measurement

- Ninety-eight percent rate their sales team a three out of five or better at selling to buyers under 45.
- Seventy-eight percent of owners have never measured if win rates differ by buyer age.
- One owner out of 27 has measured it formally. Three more have looked at it informally, by impression. Two were not sure.

The first figure above comes from all 48 respondents; the question about measurement was only asked of the 27 owners. Bases are noted throughout this article wherever they differ.

There is nothing wrong with the confidence. It was earned in a market these leaders understood extremely well. What the numbers show is that it has not been tested against the current market, which means the figures throughout this article are estimates rather than measurements. That is not a criticism of anyone's judgment; it is the condition most sales decisions in most industries are made under. It is worth knowing that it is the condition.

The confidence is not evenly distributed. Sales leadership rates their sales teams at four out of five. Owners rate them at 3.81. But service and operations leadership — the people who inherit the account after the sale — rate the same group at 3.12. These are small groups, so treat this as directional rather than definitive. But three vantage points produced three different answers, and the one furthest from the sale was the lowest. So, the further from the sale a person sits, the more conservative his read of the sales organization becomes.

What to Do With This — Take your last 20 closed opportunities and find out two things about each one: when the customer first became aware of you and roughly how old the decision maker was. It costs an afternoon and no money.

This is the item to do first because it converts everything else in this article from an industry estimate into a fact about your own dealership. Twenty deals is enough to tell you whether you look like the rest of the industry or nothing like it, and both answers are useful. If your numbers come back better than the ones in this article, you have found a genuine advantage and you should know what is producing it. If they come back worse, you have found it early, while it is still inexpensive to address.

The dealerships that get the most out of this exercise are usually the ones that discover at least one account where the customer had been evaluating them for weeks before anyone at the company knew the opportunity existed. That single discovery tends to change how the next sales call is planned — which is the entire point.

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Finding Two: The Decision Is Further Along Than You Think

Members were asked: "By the time a prospect first speaks with someone at your dealership, how much of their buying decision do you believe is already made?" The bullets below show the responses and their share of total responses.

- 26% to 50% of the decision already made, 43.8%
- 51% to 75%, 31.2%
- Don't know, 10.4%
- 0% to 25%, 8.3%
- 76% to 100%, 6.2%

Just over half — 52% — believe that 50% or less of the decision is made before a salesperson enters the conversation.

What Buyers Say About Themselves — Independent research asking buyers directly finds a substantially different picture. 6sense, surveying 2,509 B2B buyers, found that 81% had a preferred vendor in mind before ever speaking with a salesperson. Gartner's widely cited figure is that buyers spend 17% of the total purchasing process in contact with sales representatives — and that is across all competing suppliers combined. With any single vendor, it is closer to 5% or 6%.

Fifty-two percent of survey respondents believe the decision is half-made or less when the salesperson arrives. In the 6sense data, four buyers in five say they have already chosen someone. Those two figures are not measuring precisely the same thing and neither is a direct answer to the question this survey asked. But they point the same direction, and it is not the direction this industry estimated.

Why the Gap Exists and Why It Is Not Anyone's Fault — A salesperson can only observe the part of the buying process he is present for. The precontact phase is, by definition, the part no one at the dealership ever sees. Estimating it low is not arrogance or inattention; it is the structural blind spot of the position, and every seller in every industry has it.

The Confirming Detail — Sales leaders were asked separately to name the single biggest obstacle their salespeople face with buyers under 45. Not one of them named buyers who have already researched and decided. The industry has located the cause of its difficulty outside the dealership — where nothing can be done about it. What they named instead is the subject of the next finding.

What to Do With This — If most of the decision is made before contact, the first sales interaction is not the meeting — it is whatever the buyer encountered while forming

a preference. So find out what that was — for your last 10 wins and for your last 10 losses.

Ask the customers you won: "What did you look at before you called us, and what made you call us rather than somebody else?" Most will tell you, and the answers are usually more specific and more surprising than anyone expects. Losses are more difficult to ask about and worth more when you can. A buyer who chose another company will often be candid about the moment the decision tipped because there is nothing left at stake.

Every sales leader in this survey named access as the core problem — not price, not competition and not product. It was the inability to get in front of a buyer at all.

The encouraging part of this finding is that the precontact phase is not beyond your reach. It is simply not being managed by anyone — which means the first dealership in a market to treat it deliberately gets a head start that is difficult to see and to copy.

Finding 3: The Currency That Used to Buy the Meeting Is Gone

Sales leaders were asked to name the single biggest obstacle their salespeople face with buyers under 45. Seven options were offered, with the answers landing on two of them. The bullets below show the responses and their share of total responses:

- Buyers who will not meet in person, 85.7% (six out of seven responses)
- Getting any response to outreach, 14.3% (one out of seven)
- Being invited into the process early enough, 0%
- Buyers who have already researched and decided, 0%
- Demands for pricing before engagement, 0%
- Buyers who prefer to purchase without a rep at all, 0%
- No significant obstacle, 0%

The two answers are the same, stated two ways. Every sales leader in this survey named access as the core problem — not price, not competition and not product. It was the inability to get in front of a buyer at all.

Pause and think about what they passed over to get there. No one said being invited too late. No one named buyers who had already decided. The problem, as this industry experiences it, is not that the sale is being lost — it is that the conversation is not happening.

Why the Conversation Stopped Happening — A sales appointment is a transaction before it is a conversation. The buyer pays with an hour of his working day. And for most of the history of this industry, the seller paid, too.

The seller's currency was information: what products existed and what they actually cost; what the competition was doing; what the specifications meant in practice; and what other companies in a similar position had chosen and how it worked out. A buyer gave up an hour and received something he could not get any other way. It was a fair trade and it cleared so reliably for so long that an entire generation of sales models was built on the assumption that it always would. This is what we call "the information imbalance," and most popular sales models were built on it as their foundation. The buyer needed information. The seller had it. Meeting set.

That information is now free, available more quickly and is there at 11 p.m. on the buyer's smartphone while he eats Cheetos — without scheduling anything. The seller has nothing left to pay with and he is still asking the buyer to spend.

Buyers did not become busier, more rude or less interested in relationships. They ran the math on the hour and the trade stopped clearing. A meeting that delivers what a search would have delivered does not merely fail to help — it costs the buyer an hour and confirms that the next request should be declined; not just from this salesperson, but other salespeople selling other things. Cascade that and you have a buyer cohort that needs a much bigger reason to meet than in the past. "I want to talk to you about your printers" is not likely to be a winning phone talk track for a salesperson.

This reframes the problem in a way that matters practically. "Buyers won't meet with us" locates the cause outside the dealership, where nothing can be done. "We no longer bring anything to the meeting they can't get without us" locates it inside, where something can. This is an issue that you can fix.

It Is Now Worse Than Parity — For 20 years, the story of B2B selling has been that buyers caught up — that information that used to live with the seller became freely available and the two sides reached rough equality. One member response suggests that account is out of date: "ChatGPT/AI is used to develop questions for our buyers." — *Sales leadership, 60 or older*

Buyers are now using AI to prepare for sales conversations — generating the questions they will bring, the comparisons they will make and the objections they will raise. Almost no salespeople are using it to prepare for the same conversation. A buyer who has done that arrives not merely informed, but structurally prepared with a question list built to expose exactly the gaps a seller would prefer not to discuss. The information imbalance did not close. It reversed.

There is a related finding in the outside research worth putting alongside it. Gartner reports that 69% of B2B buyers encounter inconsistencies between what a vendor's website says and what a salesperson tells them. To a buyer who has already read everything, transparency is not a corporate value;

it is whether he gets the same answer twice — and he is checking.

What Is Left That a Buyer Cannot Get Without You? — The answer is narrower than it used to be and more valuable. No one can search his own print environment. No one can look up his real cost per page, what his actual usage patterns imply about the fleet he is carrying, where his volume is going, or what a company of its size and shape in his industry typically discovers when someone finally examines it properly. That information does not exist anywhere on the internet, because it is about his company. Getting beyond the need for printers, pages-per-minute and dpi specs, and into understanding the real role of print at the buyer's company — and then giving hard-won insights and advice about how to maximize print's impact and effectively manage cost — is not just important for winning business. It is important for winning the meeting itself and should be built into outreach talk tracks and copy.

It also cannot be produced in the meeting. It has to be brought to the meeting, which means hours of work before a conversation that may not happen — and that raises a question this article returns to in the fifth finding.

What to Do With This — Before requesting the next meeting, answer one question honestly: "What am I bringing that this buyer cannot get without me?" If the answer is the product line, the specifications or the pricing, the meeting is being requested on credit. If your answer includes platitudes like "great service" or "a relationship with me," you have already exceeded your credit limit.

Then do the thing almost no one is doing. Before the call, ask your own AI tool the question your buyer has probably already asked his: "If I were a customer of a company like mine, what questions should I be asking?" It takes about two minutes and it will produce several questions you would rather not be asked. Those are precisely the ones you should have an answer ready for. A salesperson who walks in already holding the buyer's own list is in a very different conversation than one who gets it handed to him cold.

AI is a wonderful tool for enriching the sales interaction. It can not only research your buyer (and your company from the buyer's perspective), but it can also (when properly trained) role play sales calls with real prospects before they happen.

This is the most immediately available advantage noted in this entire article and it costs nothing but the discipline to do it before the meeting rather than after. The information that used to make a sales call worth an hour is gone. The information that can replace it — what this customer's operation actually looks like, what its volume patterns imply, what the fleet it is carrying is really costing it — is still exclusively yours, because it does not exist anywhere a buyer can search for it.

Before the call, ask your own AI tool the question your buyer has probably ... asked his: "If I were a customer of a company like mine, what questions should I be asking?"

Finding Four: One Lever, Pulled Every Time

Owners were asked what they usually do first when sales results disappoint. The bullets below show the responses and their share of total responses:

- Push harder on accountability and activity, 77.8%
- Change the sales process, 11.1%
- Provide sales training, 11.1%
- Change the compensation plan, 0%
- Replace underperformers, 0%
- Hire more salespeople, 0%

Three-quarters of owners reach for the same instrument. It is the one aimed at the salesperson rather than at the system he works inside. There is a reason it is the instrument nearest to hand.

Why Sales Gets This Treatment & No Other Department Does — When manufacturing misses a target, no one concludes that the line workers stopped caring. When service falls behind, management looks at scheduling, staffing and tooling. Sales is the only function in a business routinely diagnosed with a problem of will.

There is a reason, and it is not stupidity. Sales is the only department where individual variation is constant and visible. Two salespeople with the same territory, the same products and the same pricing produce different numbers. That variance is real — which makes effort look like the cause when it may only be the most visible thing in the picture.

What That Produces Over Time — Results disappoint, management pushes harder and results still disappoint because the cause was structural. Management concludes the salesperson was the problem and replaces him. The new hire is placed into the same compensation plan, the same undocumented process and the same profile no one ever wrote down. He underperforms and is replaced.

Run that loop four times and the pattern genuinely looks like a labor supply problem. From inside, the two are indistinguishable because the one thing that varied each time was the person. It is worth noting that 59% of owners now name hiring as a top concern.

Whether Pushing Harder Can Work is an Arithmetic Question — There is a specific reason this matters more now than it did 10 years ago and it has nothing to do with anyone's effort.

Published estimates put current B2B cold-call connect rates somewhere between roughly one in 10 and one in 20 on cold lists. Belkins, analyzing a full year of outbound calling,

reports a per-dial connect rate of 9.9%, and a Cognism dataset of 200,000 calls puts the U.S. average at 8% to 12% on generic data and 18% to 22% on verified direct-dial numbers. These figures come largely from companies that sell outbound tools and data, so treat them as directional rather than definitive — but they cluster tightly and they cluster low.

Set that against a number that is easier to verify. A salesperson call-blocking from a good database makes roughly 20 dials an hour. That figure comes from years of direct observation and it holds up under testing. Historically, until about seven or eight years ago, you could reliably predict that a salesperson, working through a good database that included current contact names, would (on average) connect with the targeted contact about one out of every three dials. Some days were better, some worse, but the connect ratio over time always landed between one in three or four.

Assuming that salesperson was talking to the proper people and using an adequate talk track (not an outstanding one, but not awful either), that salesperson would typically land a meeting on the average of one in three connects. Again, some days were better, some worse, but this was the average. On average, a rep landed a meeting about once in nine to 10 dials.

For example, take a rep who needs eight live meetings a week. At a connect rate of one in three and a meeting-to-connect rate of one in three — which is what this work looked like when many of the people reading this learned to do it — that is 70 to 80 dials, or about four hours. At one in 10 connects, it is 240 dials, or 12 hours. At one in 15, it is 360 dials — 18 hours a week, or two-and-a-half days of pure dialing on top of proposals, demos, service calls and existing accounts. And that is assuming you could even find someone willing to spend half of a week doing nothing but hammering on the phone in addition to outside sales work. It is also assuming that the connect-to-meeting ratio has not changed. The previous finding indicates that it may have changed for the worse.

When the conversion rate falls by a factor of three or five, the only way effort alone solves it is a threefold or fivefold increase in effort. Very few salespeople can do that, and no territory can supply the names.

The territory runs out before the calendar does. Three hundred and sixty dials a week is roughly 1,440 a month, which cycles most mid-market prospect lists every few weeks — and the fourth call to the same prospect in a quarter performs worse than the first.

None of that means outbound stopped working. It means the amount of it required to produce the same result has changed and activity standards written against the old ratio will now be missed by people who are doing everything asked of them. It also means that "outbound" now means "multichannel"; salespeople must now find the most accessible channel to reach the buyer, whether that be by phone, email, text, social media, referral or another channel. And it means that KPIs must be built around those channels. This changes the definition of "activity" in a very meaningful and fundamental way — the salesperson who does nothing but pound the phone is probably on the road to failure.

Accountability works and every dealership in this study already knows how to apply it. What has changed is what it should be applied to.

What to Do With This — Before the next accountability conversation, ask one question: "Has anything here changed that would make the behavior being asked for more likely to work than it did two years ago?" If not, the conversation is unlikely to hold — and not because the person does not care. Nothing around him moved.

This is also the most fixable problem noted in this article, because the instrument is not broken. Accountability works and every dealership in this study already knows how to apply it. What has changed is what it should be applied to. A conversation about whether a rep made his dials is a conversation about the old ratio. A conversation about what he brought to his last five meetings, or how many of his opportunities came from a referral rather than a cold list, is a conversation about the current one — and it is exactly as measurable.

Finding Five: What Actually Changed

Members were asked which of the following their dealerships have changed in the last three years specifically in response to changes in buyer behavior. Multiple answers were allowed. The bullets below show the responses and their share of total responses:

- Marketing or website, 39.6%
- Sales process or methodology, 18.8%
- Don't know, 12.5%
- The profile we hire for, 10.4%
- Nothing has changed, 10.4%
- Sales training, 8.3%
- Compensation plan, 0%

Not one respondent — out of 48 — named the compensation plan. And it is not that compensation never changes. Owners were asked separately when their sales compensation plans were last significantly revised, and 52% said within the last two years. Compensation gets revised for margin, for cost and for competitive pressure, but it does not appear to get revised for the buyer.

A compensation plan is the most precise instruction a dealership ever gives its sales force. It states, in dollars, exactly which behaviors the business will pay for. If the buyer has changed and the plan has not been reexamined against that change, the plan is quietly still paying for the previous market — and a compensation plan will win that argument against any amount of coaching, training or accountability. That is not a criticism of the plan. It is what compensation plans do.

If the buyer has changed and the [compensation] plan has not been reexamined against that change, the plan is quietly still paying for the previous market ...

The Website Finding Is Not a Criticism — Marketing and the website drew four times as many responses as any structural change and, given the second finding, that is the right instinct. If most of the decision forms before contact, the website is a sales — not a marketing — asset. The questions worth asking are whether it is being managed that way and whether the salespeople know what it says.

What to Do With This — Before changing anything, measure what your current standards actually cost. Pick one salesperson and one month. Log three numbers: dials, live conversations with a decision maker and appointments set. Define a connect honestly. A receptionist is not a connect and that distinction alone will move the number more than most people expect.

Then run the arithmetic backward against the standard already in place. If the expectation is a certain number of appointments a week, work back through your real ratios and see how many hours of dialing that implies. If the answer is more hours than the week contains, the standard was built on a conversion rate that no longer applies and the salesperson has been failing a math problem rather than a discipline test. That is a much easier thing to fix than a motivation problem, and it is fixable this quarter.

Do that before touching compensation. A compensation plan built on unverified ratios will encode the same wrong assumption more expensively. Measure first, then decide what the plan should pay for — and put the same question to your buyer that you put to your rep: If a salesperson spent six hours preparing for one meeting that made him genuinely useful, would your plan pay him better than the one who skipped it and made three more calls?

A tracking study across several sales organizations in different industries is underway to establish these ratios properly. You can ask for results when they become available in January.

Finding Six: Hiring Is the Top Concern & the Least Structured Activity

Owners were asked what concerns them most about their sales organizations over the next three years, choosing up to two. The bullets below show the responses and their share of total responses:

- We cannot hire good salespeople, 59.3%
- Margin pressure, 44.4%
- Succession in sales leadership, 25.9%
- Customers buying without ever speaking to a rep, 11.1%
- Our customer base is aging with us, 11.1%
- Our reps cannot reach younger decision makers, 7.4%

How the Industry Hires — Sales leaders were asked what they weigh most heavily when hiring a salesperson today. Forty-three percent said cultural fit, 29% said a referral from someone they know and trust, 14% said a documented sales track record and 14% said industry experience. Zero percent use the results of a structured assessment.

Cultural fit and referral together account for 71% of hiring weight. Both can be legitimate signals, however, all too often, "cultural fit" is another way of saying "gut instinct," which is not measurable or verifiable. Neither is written down anywhere, which means neither can be revised when the job changes. An unwritten profile cannot be updated, which is how a dealership ends up hiring for the job it used to have rather than the one it has now.

The Related Number — Only one sales leader in seven reports a documented sales process that is consistently followed. Forty-three percent have one documented but inconsistently followed; 29% have something informal and undocumented; and 14% have no defined process at all.

A new salesperson hired against an unwritten profile, onboarded into an undocumented process and measured on activity is being asked to reconstruct the job from scratch. Some will, most will not, and the ones who do not are usually the ones who get replaced.

What to Do With This —Write the profile down before the next opening. Not the job description — the profile. What does a person who succeeds here actually do in the first 90 days and what evidence in an interview would suggest a candidate can do it?

Take your two best salespeople and write down what they actually did in their first three months that the ones who failed did not. Most owners find they can name it in about 20 minutes, and most are surprised that no one has ever written it down. That document is what makes the profile improvable — because next year, when the job has shifted again, there is something on paper to argue with.

This is the one finding from the survey results where the industry has an advantage it is not using. Cultural fit and referral are not necessarily bad signals, particularly if combined with

a structured psychometric assessment; they reflect something real about how these businesses work. The problem is only that they live in one person's head. Depending on that one person's experience, they may be hiring a salesperson to sell to a buyer who does not exist anymore. "Cultural fit" and "referral," coupled with the results of a structured psychometric assessment, can greatly increase hiring reliability. Written down and paired with one structured element — even a single consistent set of questions asked of every candidate — they become a system that can be handed to a successor. Which matters, because a quarter of the owners in this study named succession in sales leadership as one of their two biggest concerns.

Look at your website the way a buyer forming a preference would, and find out whether your salespeople know what it says and sing from the same songbook ...

Where to Start

Here are six actions you can take. None of them requires a budget, a consultant or a new system. Most take an afternoon. They are listed in the order they build on each other — the first two produce the information the rest depend on.

■ Pull your last 20 closed opportunities. Record when the customer became aware of you and roughly how old the decision maker was. This converts every estimate in this article into a fact about your own dealership.

■ Ask 10 recent wins what they looked at before they contacted you and what made them contact you rather than someone else. Ask any losses you are still on speaking terms with. Write the answers down.

■ Before the next significant sales call, ask an AI tool: "If I were a customer of a company like mine, what questions should I be asking them?" Bring answers to those questions to the meeting.

■ Measure one salesperson for one month: dials, live conversations with a decision maker and appointments set. Define a connect honestly. Then check whether your current activity standard is arithmetically reachable.

■ Look at your website the way a buyer forming a preference would, and find out whether your salespeople know what it says and sing from the same songbook as the website. It is the one thing most dealerships have already changed — and the one most likely to be managed as marketing rather than as the first sales call. Properly trained, AI can be an excellent website auditor.

■ Write down the profile of a salesperson who succeeds at your dealership. Start with your two best people and what they did in their first 90 days. Do it before the next opening, not during it.

Nothing on this list is difficult. What most of it requires is looking at something that has not been looked at recently — which is, in the end, what this entire article is about.

Want to Talk About It?

Members with questions about how any of this applies to their own dealerships are welcome to get in touch. There is no cost and nothing to buy — if a finding in here raised a question about your own numbers, that is a conversation worth having. Email me at troy@troyharrison.com or call (913) 645-3603, say you are a BTA member and reference this article. If you would like the January multi-industry study when it is published, ask for that as well and it will be sent when it is ready. ■



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