

The Challenger Sale

Taking Control of the Customer Conversation

Matthew Dixon and Brent Adamson. Portfolio, 2011.

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Book Overview

The Challenger Sale reports the results of a large empirical study of business-to-business sales reps conducted by the Corporate Executive Board, CEB, in the wake of the 2008 recession. CEB surveyed sales leaders, then studied roughly six thousand reps across ninety companies, and asked what actually separates the star performers from the core performers, especially in complex solution sales. The finding contradicts decades of received wisdom in the sales profession. Relationship-building reps, the profile most sales leaders would have said dominated star performance, made up only four percent of stars in complex sales. Challenger reps, the profile most sales trainers had never named, made up fifty-four percent.

The book turns that finding into an operating model. Challengers do three things well. They teach the customer something new about the customer's own business. They tailor their message to different stakeholders inside the customer. They take control of the sale by staying assertive on price and process. The book translates each into trainable behaviors, gives the six-step Commercial Teaching pitch structure, describes the four properties of a good insight, and covers the manager and organization changes required to move the average rep toward the Challenger profile. It closes with implementation lessons from the companies that were among the first to adopt the model.

In complex B2B sales, star performers are Challengers, not Relationship Builders. They teach, tailor, and take control, and the behaviors underneath each are trainable rather than innate. The framework is a management system as much as a rep skill set.

Chapter Summaries

Chapter 1: The Evolving Journey Of Solution Selling

Chapter One frames why the CEB research mattered. Solution selling, the dominant B2B sales philosophy since the 1990s, teaches reps to discover customer needs and build custom offers. It worked while customers found it hard to define their own needs. That world has changed. Buyers now assemble buying committees averaging more than five stakeholders, they conduct their own research, and they compress vendor selection into short late-stage engagements. Under these conditions, discovery-based selling loses to a different approach.

- The number of stakeholders in a typical B2B buying committee has risen from a single decision maker to an average of five point four, and later CEB research extended this to six point eight. Each stakeholder adds complexity to consensus and drives the buying cycle toward the lowest-risk, most compromised choice.
- Customers now complete on average fifty-seven percent of the purchase decision before engaging a sales rep. What the rep once did in discovery, the buyer now does in research. This shifts what a sales conversation can add.
- Solution selling built its reputation on the ability to unpack customer needs through discovery questions. When customers arrive already convinced of their own diagnosis, discovery becomes theater and the rep loses control of the conversation shape.
- The failure mode for a solution-selling organization in the current buying environment is quiet. Deal sizes shrink, discount rates rise, sales cycles extend, and win rates decline against low-cost competitors. The CEB research identifies this as the pattern the Challenger model addresses.

Chapter 2: The Challenger, A New Model For High Performance

Chapter Two presents the core finding. CEB studied approximately six thousand reps across ninety companies on forty-four attributes, ran factor analysis, and identified five distinct rep profiles. Hard Worker, Challenger, Relationship Builder, Lone Wolf, and Reactive Problem Solver. When the reps were sorted by performance, one profile stood out. Challengers made up thirty-nine percent of star performers overall, and fifty-four percent of stars in complex solution sales. Relationship Builders, the profile most training programs optimize for, made up only seven percent of stars overall and four percent in complex sales.

- The five profiles are defined by observable behavior, not personality. Hard Workers show up and grind. Challengers push customers to think differently. Relationship Builders invest in personal connection. Lone Wolves follow their own instincts. Reactive Problem Solvers respond quickly to customer requests.
- The distribution is roughly even in the average sales organization, twenty percent each. The performance distribution is not. In complex sales, Challengers outperform every other profile by a wide margin, and Relationship Builders underperform badly.
- The finding is counterintuitive because Relationship Builders are the most commonly hired-for profile and the most frequently reported target of sales training. Both selection and training are optimized for the wrong profile in complex B2B sales.
- Neil Rackham, whose SPIN Selling research is the closest academic antecedent, wrote the book's foreword and endorsed the finding as the most important sales research since his own thirty years earlier. Dave Kurlan and others in the sales-training industry have pushed back on the methodology, arguing the five-profile factor analysis may collapse real individual differences into forced categories. The finding itself has been reproduced in follow-on CEB studies with larger samples.

Chapter 3: The Challenger, Exporting The Model To The Core

Chapter Three answers the natural question raised by the finding. Can Challenger behaviors be taught to non-Challenger reps, or are they innate? The authors argue the behaviors are trainable, and lay out the three-part model that defines what a Challenger does. Teach, tailor, and take control. The chapter also introduces the argument that the organization matters more than the individual rep. A Challenger cannot execute in a company that has not built the insight, the tailoring tools, and the pricing discipline required to support the profile.

- The Challenger's three behaviors, teach for differentiation, tailor for resonance, and take control of the sale, are the model's operating summary. Each is trainable, and each has a specific set of underlying observable behaviors that a manager can coach against.
- Teach means bringing the customer a new insight about the customer's own business that reframes what the customer needs to do. It is not thought leadership content. It is a specific insight tied to what the seller does that no competitor can match.
- Tailor means adjusting the insight to the concerns of the specific stakeholder in the room. Economic buyer, technical buyer, user, mobilizer. The book later develops the mobilizer concept in its follow-up, The Challenger Customer.
- Take control means holding firm on price, staying assertive on process, and pushing back constructively when the customer resists. The behavior most reps confuse with aggression is actually the willingness to say no to bad deal shape.

Chapter 4: Teaching For Differentiation, Why Insight Matters

Chapter Four is the first of two chapters on teaching. It makes the case that insight, defined as a new understanding of the customer's own business, is the primary driver of customer loyalty in complex B2B sales. CEB's customer-loyalty research surveyed thousands of B2B buyers and asked what made them loyal to a vendor. The answer was not product, not price, not brand. It was the sales experience itself, and specifically whether the sales conversation taught the buyer something new about their own business.

- CEB's customer-loyalty study found that fifty-three percent of the variance in customer loyalty is driven by the sales experience. Product and service, brand, and

price-to-value together account for the other forty-seven percent. The biggest single driver is inside the sales conversation, not around it.

- Inside the sales-experience component, the specific behavior that drives loyalty is teaching the customer something new about their own business. Not responsiveness. Not likeability. Insight into the buyer's own situation.
- This finding recasts the sales conversation. It is not a needs-discovery session. It is a teaching session in which the rep brings something the buyer did not know they needed to know.
- The implication for sales enablement is that content designed to communicate product features is not the highest-leverage investment. Content designed to surface a specific insight about the customer's business is. Most enablement budgets are inverted.

Chapter 5: Teaching For Differentiation, How To Build Insight-Led Conversations

Chapter Five is the operational chapter of the book. It presents the six-step Commercial Teaching pitch structure that Challenger reps use to deliver insight. It also names the four properties every teach must have to work. It must lead back to a unique seller capability, challenge a customer belief, create urgency, and generalize across customers. The chapter then describes the organization function required to build insights, which lives in marketing or enablement, not in the sales team itself.

- The six-step Commercial Teaching pitch is Warmer (show you understand their world), Reframe (introduce the surprising insight), Rational Drowning (quantify the cost of the current approach), Emotional Impact (make the story personal to this customer), A New Way (describe what has to change, vendor-agnostic), Your Solution (only now, position your product).
- The order is the whole point. The solution comes last, after the buyer has accepted that their current thinking is wrong. Most sales calls invert the order and lead with the solution, which trains the buyer to compare features against alternatives.
- The four properties of a good insight are that it leads back to a unique seller capability (no one else can deliver it), it challenges a customer belief (not a confirmation), it creates urgency (the cost of inaction is quantified), and it generalizes across

customers (the same teach works for the segment, not just one buyer).

- The insight function is a small team, typically two to five people in product marketing or sales enablement, whose full-time job is to build teaches that meet the four properties. Companies that adopt Challenger successfully build this function. Companies that fail try to make it the rep's job.

Chapter 6: Tailoring For Resonance

Chapter Six covers the second Challenger behavior. Tailoring means adjusting the teach to the specific stakeholder in the room. The book distinguishes three audiences. The industry (macro concerns), the company (organizational concerns), and the individual (role-specific concerns). Each level requires a different version of the same insight, and the rep who can move fluidly across levels wins the buying committee.

- Tailoring is not personalization in the marketing sense. It is the rep's ability to translate a single insight into three different framings. How it affects the industry, how it affects the customer's specific company, and how it affects the individual stakeholder's role and metrics.
- The stakeholder map matters. In a complex B2B deal with five to seven stakeholders, each has a different concern about the same purchase. A CFO worries about return on investment. A department head worries about adoption. An end user worries about workflow disruption. The same teach must land differently in each conversation.
- The book flags a specific stakeholder role, the mobilizer, whose engagement predicts whether the deal closes. The mobilizer is the internal stakeholder who will actively drive the purchase forward inside the customer organization. The concept is expanded in the sequel, *The Challenger Customer*.
- The operational implication for the sales organization is that stakeholder mapping is a required deliverable on any complex deal, and the tailored teach for each mapped stakeholder is what the rep prepares before the meeting.

Chapter 7: Taking Control Of The Sale

Chapter Seven covers the third Challenger behavior. Taking control is often misread as aggression. The book defines it precisely. It is the rep's willingness to hold firm on price, to push back constructively when the customer resists, and to keep the sales process on track by refusing to accept bad deal shape. Challengers close larger deals at higher margins than Relationship Builders in part because they say no more often.

- Taking control is measured by the rep's behavior in three specific moments. When the customer asks for a discount, when the customer asks for a customization that erodes the deal shape, and when the customer tries to skip a stage in the process. Challengers say no in each. Relationship Builders say yes.
- The book distinguishes assertive from aggressive. Assertive means holding a position while acknowledging the customer's concern. Aggressive means holding a position without acknowledging it. The distinction is trainable and observable.
- Discount discipline is the fastest test of whether a rep is taking control. In the data, Challengers close deals at prices roughly ten to fifteen percent higher than Relationship Builders in the same accounts. The gap is not because Challengers sell to different buyers. It is because they hold price better.
- The take-control behavior is uncomfortable to hire for and uncomfortable to coach. Sales managers who conflate customer satisfaction with deal outcome punish the behavior. The book flags this as one of the top implementation failures.

Chapter 8: The Manager And The Challenger Selling Model

Chapter Eight moves from rep behavior to manager behavior. The Challenger model requires a specific style of frontline sales management. Coach observable behaviors on named live deals, inspect the pipeline weekly against the teach-tailor-take-control framework, and hold reps accountable to the specific behaviors rather than to the ambient sense that they are working hard. The chapter argues that the manager change is more important than the rep change, because reps default to whatever behavior their manager rewards.

- The Challenger manager's job is to coach the observable behaviors of teach, tailor, and take control on named live deals. Not on rep skills in general. Not on hypothetical scenarios. On the actual next step of an actual pipeline deal.

- Pipeline inspection under the Challenger model asks specific questions. What insight did the rep bring to the last meeting? Which stakeholder did they tailor for? Where in the process did the rep take control, or fail to take control? These replace the generic pipeline-review questions most managers ask.
- Manager coaching cadence matters more than manager coaching skill. The book's data suggests that weekly coaching of thirty minutes per rep, focused on specific deals, produces more performance improvement than quarterly deep-dive sessions of several hours.
- The frontline sales manager is the highest-leverage role in the sales organization for adopting the Challenger model. Companies that fail at implementation usually did not retrain their managers. They trained the reps and expected the managers to follow. The book argues this order is backwards.

Chapter 9: Implementation Lessons From The Early Adopters

Chapter Nine and the afterword compile lessons from the CEB member companies that adopted the Challenger model early. The pattern of successful adoption is clear. Build the insight function first, retrain the managers second, retrain the reps third, and change the compensation and hiring criteria last. Companies that try to move faster or in a different order tend to lose momentum before the results materialize.

- Build the insight function before training the reps. Reps who are trained on Commercial Teaching without any actual teaches to deliver revert to old habits within a quarter. The insight function is the enabling infrastructure.
- Retrain the managers before retraining the reps. Reps take direction from their manager's weekly behavior, not from a training class taken two quarters ago. A manager who has not been retrained on Challenger coaching will reinforce the old behavior no matter what the reps learned.
- Change hiring criteria last. Existing reps can move toward the Challenger profile with training and coaching. The evidence in the book is that most reps can develop the behaviors over eighteen to twenty-four months. Companies that try to hire the way to a Challenger sales force before retraining the existing reps run into culture and pipeline problems.

- The book's afterword closes with the argument that the Challenger disposition applies beyond sales. Any function that has to move a resistant stakeholder, including product, engineering leadership, and the CEO herself, benefits from the teach-tailor-take-control model. The applicability outside the sales function is broader than the book title implies.

About the Authors

Matthew Dixon and Brent Adamson led sales research at CEB, the Corporate Executive Board, when they conducted the study behind *The Challenger Sale*. CEB was a member-based research and advisory firm serving corporate sales, marketing, HR, and IT leaders, and was acquired by Gartner in 2017. Dixon led the sales practice as a group leader. Adamson was a principal executive advisor. *The Challenger Sale* was the third and most widely read book in a series of CEB research-based books, and it became a New York Times bestseller in the year of publication. The framework became one of the two or three most widely adopted sales models in enterprise B2B during the decade that followed.

Dixon and Adamson wrote two subsequent books extending the framework. *The Challenger Customer*, 2015, applied the research to the buyer side and introduced the mobilizer concept. *The Effortless Experience*, 2013, applied similar research methodology to customer service. Dixon has since founded DCM Insights and remains active as a keynote speaker and consultant. Adamson has moved into independent research and writing on the future of B2B buying. The authors are researchers, not sales practitioners, and the book's authority rests on the CEB study underneath it. Readers should note this. The framework is generalized from surveys of six thousand reps, not from either author's own field track record.

Key Takeaways

1) Relationship Builders lose in complex B2B. Challengers win.

The central CEB finding is that in complex solution sales, Challengers make up fifty-four percent of star performers and Relationship Builders make up only four percent. The gap is not marginal. It contradicts decades of sales training optimized for relationship-building. For a founder-CEO whose company sells complex B2B, the finding forces a hard question. What profile is the sales team hiring for, training for, and rewarding? If the answer is Relationship Builder, the sales team is optimized for the wrong outcome.

- The five profiles are roughly evenly distributed in the average sales organization. What changes is which profile ends up in the star category. In complex sales, Challengers dominate.
- Relationship Builders are not bad reps. In simpler transactional sales they hold their own. The finding is specifically about complex solution sales, where consensus buying and information parity have changed the shape of the conversation.
- The hiring criteria most sales organizations use, including cultural fit, customer likeability, and consultative-selling references, select for the Relationship Builder profile. Selection has to change alongside training.

2) Sales experience drives more customer loyalty than product, brand, or price.

CEB's customer-loyalty research found that fifty-three percent of the variance in customer loyalty is driven by the sales experience itself, not by what the vendor sells or how it is priced. This is one of the book's least-cited but most consequential findings for a CEO. It means the sales team is not a downstream cost of the product. It is the primary driver of the customer outcome that keeps buyers loyal, and it deserves investment on that basis.

- The specific behavior inside the sales experience that drives loyalty is teaching the customer something new about their own business. Not responsiveness, not accessibility, not likeability. Insight.
- The finding recasts what enablement investment should produce. Content designed to communicate product features underperforms content designed to surface

customer insight. Most enablement budgets are inverted.

- For a founder-CEO, this is a direct budget-allocation argument. If the sales experience is the biggest driver of loyalty, the ratio of product-marketing spend on features versus on insight should tilt strongly toward insight.

3) Insight is a specific asset, not a slogan. Build the four properties.

The book's most immediately operational contribution is the definition of a good teach. It has four properties. It leads back to a unique seller capability so no competitor can execute the same teach. It challenges a customer belief rather than confirming one. It creates urgency by quantifying the cost of inaction. It generalizes across the customer segment so the same teach works for the market, not just for one buyer. Every insight the enablement function produces should be tested against these four criteria.

- The unique-capability criterion is the most often skipped. Teaches that lead the customer to a general conclusion (you should adopt cloud) do not differentiate the seller. Teaches that lead to a specific capability the seller can uniquely deliver do.
- The challenges-a-belief criterion rules out most thought-leadership content. White papers that confirm what the buyer already thinks are not teaches. They are validation. The buyer's response is thanks, not tell me more.
- The generalizes criterion is why the insight function is small. Two to five people can produce teaches that scale across a customer segment. Custom insight per deal is not scalable and is not the model.

4) The Commercial Teaching pitch structure sequences the sale correctly.

The six-step choreography, Warmer, Reframe, Rational Drowning, Emotional Impact, A New Way, Your Solution, is the specific pitch structure Challenger reps use. The order is the whole point. The solution comes last, after the buyer has accepted that their current thinking is wrong. Most sales calls invert the order and lead with the solution, which trains the buyer to compare features against alternatives. When the order is correct, the buyer arrives at the solution already convinced they need a new approach.

- Warmer opens by showing you understand the customer's world. It builds credibility before the challenge. Most reps skip it and lose the room before the reframe lands.

- Reframe is the surprising insight. Rational Drowning quantifies the cost. Emotional Impact makes the story personal to this customer. A New Way describes what has to change, without naming the seller's product yet.
- Your Solution comes only when the buyer is nodding along with the new way. If the buyer is not, the rep should go back to Emotional Impact rather than pushing into product. The step-back move is the tell of a trained Challenger.

5) Tailor the teach to three levels. Industry, company, individual.

The tailoring behavior is where most reps fall short. A good Challenger takes a single insight and translates it into three different framings. How it affects the industry, how it affects the customer's specific company, and how it affects the individual stakeholder's role and metrics. In a complex B2B deal with five to seven stakeholders, the same teach must land differently in each conversation, or the buying committee cannot converge on consensus.

- Tailoring is not personalization in the marketing sense. It is the rep's ability to reframe the same insight for different stakeholder concerns.
- Stakeholder mapping is a required deliverable on complex deals. Reps who cannot list the five to seven relevant stakeholders and each of their concerns cannot tailor effectively.
- The mobilizer role, developed further in the sequel *The Challenger Customer*, is the internal stakeholder who drives the deal forward inside the customer organization. Identifying and equipping the mobilizer is the highest-leverage tailoring activity.

6) Taking control is discount discipline and process discipline. Coach it.

Taking control is the most commonly misread of the three behaviors. Most reps hear it as license to be aggressive. The book defines it precisely. It is the rep's willingness to hold firm on price, to push back constructively when the customer resists, and to keep the sales process on track by refusing to accept bad deal shape. Challengers close deals at prices roughly ten to fifteen percent higher than Relationship Builders in the same accounts. The gap is discount discipline.

- The three moments where taking control shows up. When the customer asks for a discount, when the customer asks for a customization that erodes deal shape, and

when the customer tries to skip a stage in the process.

- Assertive means holding a position while acknowledging the customer's concern. Aggressive means holding a position without acknowledging it. The distinction is trainable and observable in call recordings.
- Sales managers who conflate customer satisfaction with deal outcome punish take-control behavior. The manager retraining that Challenger implementation requires includes changing what the manager rewards in pipeline reviews.

7) The frontline sales manager is the highest-leverage change point.

The book's least-cited but most consequential argument is that the manager change matters more than the rep change. Reps default to whatever behavior their frontline manager rewards. Weekly pipeline reviews, one-on-ones, and deal coaching are where the behavior actually gets shaped. Companies that fail at Challenger implementation usually trained the reps and expected the managers to follow. The order is backwards.

- The Challenger manager coaches observable behaviors of teach, tailor, and take control on named live deals. Not on rep skills in general. Not on hypothetical scenarios. On the actual next step of an actual pipeline deal.
- Pipeline inspection under the Challenger model asks specific questions. What insight did the rep bring? Which stakeholder did they tailor for? Where did the rep take control, or fail to take control? These replace the generic questions most managers ask.
- Weekly thirty-minute coaching per rep, focused on specific deals, produces more performance improvement than quarterly deep-dive sessions. Cadence beats depth.

8) Sequence adoption correctly. Insight first, managers second, reps third.

Companies that adopted the Challenger model successfully followed a specific sequence. Build the insight function first. Retrain the frontline managers second. Retrain the reps third. Change hiring and compensation criteria last. Companies that tried to move in a different order tended to lose momentum before results materialized. The sequence is one of the book's most valuable specific contributions to CEOs considering the framework.

- The insight function is a small team of two to five people in product marketing or enablement. It exists before the rep training starts, or the trained reps have nothing to

deliver.

- Manager retraining before rep retraining is counterintuitive but is what the adoption data supports. Managers who have not been retrained will reinforce the old behavior no matter what the reps learned.
- Compensation and hiring changes come last because they are the slowest to move the sales force. Existing reps can develop Challenger behaviors over eighteen to twenty-four months. Hiring the way to a new sales force takes longer and disrupts culture.

Strengths And Limits

The book's strength is that it is empirical. The CEB study of approximately six thousand reps across ninety companies is the largest primary-research finding in modern sales literature, and the finding contradicts decades of received wisdom about relationship-building. Neil Rackham, whose SPIN Selling research is the closest academic antecedent, endorsed the study in the foreword as the most important sales research in a generation. The book also translates the finding into operating specifics that a sales organization can act on. The three-part behavior model of teach-tailor-take-control, the six-step Commercial Teaching pitch structure, the four properties of a good teach, the stakeholder-tailoring map, the three moments where taking control shows up, and the adoption sequence for organizations. Few sales books this popular are this concrete. The finding that fifty-three percent of customer loyalty in B2B is driven by the sales experience itself is arguably the most consequential single number in the book, because it reframes sales investment from a downstream cost to a primary loyalty driver.

The limits are real. The most persistent critique, made most publicly by Dave Kurlan and other sales-training practitioners, is that the five-profile factor analysis may collapse real individual differences into forced categories that do not capture what actually varies across reps. CEB has run follow-on studies confirming the distribution, but the underlying survey methodology has not been fully independently replicated. The book is also written for enterprise B2B with complex solution sales, long cycles, and large buying committees. Companies selling smaller-ticket products, product-led-growth motions, or transactional B2B will find the mechanics do not map directly, though the

underlying model of teaching and tailoring often still applies. The book was written in 2011, before product-led growth, revenue operations as a function, and AI-assisted buyer research became mainstream. The core finding survives these changes and arguably strengthens under them, but the operational chapters would look different if written today. Finally, the authors are researchers rather than sales operators. The implementation guidance draws on CEB member companies rather than on the authors' own field track record. The reader is trusting the research, not the practitioners, which is a fair characterization of the source of authority rather than a disqualifier.

Bruce's Take

The diagnosis in this book is one of the few in the modern sales literature that actually holds up under scrutiny more than a decade after publication. The finding that in complex B2B the star performer is a Challenger, not a Relationship Builder, has been reproduced in every follow-on study I have seen and matches what I observe in my own advisory work. In a growth-stage company between five and fifty million in revenue, the moment complexity enters the sale, three stakeholders instead of one, a twelve-month cycle instead of a two-week one, the founder-led rep who wins on likeability starts to lose. The pattern is exact. The book's contribution is naming it and giving the CEO a vocabulary to fix it.

The framework travels well across some contexts and poorly across others. In enterprise software, industrial equipment, and professional services where the buyer assembles a committee and the deal has real risk to the buyer, Commercial Teaching is directly applicable and I recommend the book without qualification. In product-led SaaS where the buyer is a single practitioner running a free trial, the mechanics fall apart. The insight is delivered by the product itself, not by the rep, and the rep's job is closer to expansion than to teaching. In bootstrapped services businesses under two million in revenue, the founder is the Challenger by default and the book's organizational chapters are premature. Match the framework to the sales motion before applying it.

The most credible outside critique of Challenger comes from Dave Kurlan of Objective Management Group, who argues the five-profile factor analysis forces continuous behavioral variation into artificial buckets and overstates the difference between Challengers and everyone else. For my market the objection lands only partially. Kurlan

is right that the profile taxonomy is a statistical construction, and the book overreads it. The behaviors underneath teach, tailor, and take control are real and coachable whether or not the five-profile schema is the correct way to describe them. Read the profiles as a heuristic, not a personality test. The rest of the book stands.

Where The Challenger Sale most often disappoints growth-stage CEOs is on implementation sequencing at their scale. The book was written for enterprise sales organizations with budget for a dedicated insight function and a training group. At five to twenty million in revenue the CEO does not have those resources, and the useful sequencing question is different. Read Challenger first for the argument. Read Mike Weinberg's New Sales Simplified second for the outbound mechanics the book assumes and skips, and Mark Roberge's The Sales Acceleration Formula third for the data-driven hiring and coaching system that makes the Challenger behaviors durable when the CEO is still the head of sales.

Discussion Questions

For CEOs

- Looking at my sales team's actual behavior, what is the distribution of the five profiles, and what profile do our star performers cluster in?
- Are we selecting for the Relationship Builder profile in our hiring loop, and what would selecting for Challenger behaviors look like specifically?
- Do we have an insight function inside the company that produces teaches meeting the four properties, or are we asking each rep to invent their own?
- For our top three open deals, what specific insight is the rep bringing that the buyer did not know before the conversation started?
- How much of our marketing and enablement content is product features and how much is insight about the customer's own business, and what should the ratio be?
- Where in our sales process is discount discipline weak, and what does that pattern tell us about whether our reps are taking control?
- What questions do our frontline sales managers ask in weekly pipeline reviews, and do those questions coach for teach, tailor, and take control?

- If we were to adopt the Challenger model, in what order would we build the insight function, retrain the managers, retrain the reps, and change the hiring criteria?

For Teams

- On our top three open deals, can we name the specific insight we brought that the buyer did not know before, and did that insight lead back to a capability only we can deliver?
- For each of these deals, have we mapped the five to seven stakeholders and the tailored version of the teach for each, or are we bringing the same message to every conversation?
- Where in the last quarter did we take control by holding price, refusing a customization, or pushing back on process, and where did we fail to?
- What is the pattern of discounts we have granted this quarter, and what does that pattern say about whether we are taking control?
- For our current flagship pitch, does it follow the six-step Commercial Teaching structure, and if not, where does it break down?
- Which of the five rep profiles best describes each of us based on observable behavior, and where is the team's distribution relative to our win-rate pattern?
- In our weekly pipeline reviews, what questions is the manager asking, and are they coaching for teach, tailor, and take control or for generic activity?
- Where in the customer buying committee do we have a mobilizer, and where do we not, and what would change on the deals where we do not?

Practical Tools

1. Rep Profile Audit

The Challenger model rests on the finding that in complex B2B sales, Challengers dominate star performance and Relationship Builders underperform. This audit tests whether the pattern holds in the sales team, using observable behavior rather than personality assumptions, and produces a specific finding about whether hiring and training investments are aimed at the right profile. Run it before deciding on a training investment, after a quarter where win rates or deal sizes have declined without an obvious cause, or as part of annual sales-team planning.

How it works:

- For each rep on the sales team, ask the frontline manager to classify the rep against the five profiles based on observable behavior in the last two quarters. Hard Worker, Challenger, Relationship Builder, Lone Wolf, Reactive Problem Solver.
- Cross-check the classification by reviewing three call recordings per rep. The specific behaviors to look for are whether the rep brings an insight, whether the rep adjusts the message across stakeholders, and whether the rep holds price under pressure.
- Overlay the profile classification with performance data. Quota attainment, average deal size, discount rate, sales cycle length. Note which profile clusters the top performers into.
- Compare the pattern to the CEB benchmark. In complex B2B, Challengers should be roughly half the stars. If Relationship Builders dominate, the sales team is optimized for a different outcome than the one the buying environment now rewards.
- Publish the audit to the leadership team. Decide the specific training and hiring investments for the coming year based on the gap between the current distribution and the target distribution.

The head of sales and the CEO have a shared view of which profiles the sales team currently rewards, which profiles it should reward, and what specific training, coaching, and hiring changes will move the distribution. The audit becomes the reference document for the coming year's sales investment.

2. Insight Function Build

Companies that adopt Challenger successfully build a small insight function before they retrain the reps. The function's job is to produce teaches that meet the four properties. Reps trained on Commercial Teaching without any actual teaches to deliver revert to old habits within a quarter, which is why the insight function is the enabling infrastructure and the first move in any Challenger adoption. Use it also when the existing product marketing team is producing feature-heavy content and win rates are declining against low-cost competitors.

How it works:

- Identify two to five people in product marketing or sales enablement whose job will be full-time insight production. Existing product marketing generalists usually cannot add this on top of existing work.
- For the top three customer segments, identify one insight per segment that meets the four properties. Leads back to a unique seller capability, challenges a customer belief, creates urgency, generalizes across customers in the segment.
- For each insight, produce a package. The six-step Commercial Teaching pitch, the tailored versions for three stakeholder types, the supporting data that underlies the rational-drowning step, and the customer stories that support the emotional-impact step.
- Test each insight with three sales reps in live customer conversations. Track customer response and adjust the insight until it consistently produces buyer engagement across reps.
- Establish the insight function as a permanent part of the organization, reporting to product marketing or sales enablement, with a quarterly review cadence for retiring stale insights and building new ones.

The sales team has three tested insights per customer segment, each with a full delivery package. Reps use the insights consistently in customer conversations. Marketing content shifts from product features to customer insights. Win rates against low-cost competitors begin to move within two quarters.

3. Six-Step Pitch Rewrite

The six-step Commercial Teaching structure, Warmer, Reframe, Rational Drowning, Emotional Impact, A New Way, Your Solution, is the pitch mechanic that puts the model into practice. This exercise takes the current flagship pitch and rewrites it to fit the six steps, exposing where the current pitch skips a step and training the team on the sequenced structure. Use it when the sales team has been trained on Challenger but the current pitch is still feature-led, when a major new product or capability launches, or as an annual pitch refresh.

How it works:

- Take the current flagship pitch for the most important product or capability. Break it into components. Note which of the six steps it covers, which it skips, and which it does out of order.
- For each of the six steps, write a specific version tailored to the top customer segment. The Warmer should show industry-specific understanding. The Reframe should be surprising. The Rational Drowning should have numbers. The Emotional Impact should tell a specific customer story. The New Way should be vendor-agnostic. Your Solution should come last.
- Test the rewritten pitch in role-play with three reps and a manager acting as buyer. Note where the pitch loses the buyer, and adjust.
- Test the pitch in three live customer conversations with senior reps. Record and review. The buyer's response at the end of the New Way step is the tell of whether the pitch is working.
- Roll out the finalized pitch to the full team with two role-play sessions per rep. Measure adoption by call recording review, not by attendance at the training.

The team's pitch consistently opens with a specific industry insight, quantifies the cost of the status quo, and lands on the seller's unique solution only after the buyer has already accepted that a new approach is needed. Discovery calls change shape, and the win-rate pattern begins to move within a quarter.

4. Stakeholder Tailoring Map

In complex B2B deals with five to seven stakeholders, the same teach must land differently in each conversation. The stakeholder tailoring map is a compact deliverable that names every relevant stakeholder, their role, their metric, and the version of the teach that lands for them. Require it on every complex deal above a threshold size and review it at the pipeline meeting for each active deal. Use it also as a diagnostic when a deal has stalled without a clear reason.

How it works:

- For the deal, name every relevant stakeholder in the customer organization. Economic buyer, technical buyer, user, blocker, mobilizer. In a typical complex deal this is five to seven names.
- For each stakeholder, note their role, the metric they are measured on, and the concern they will bring to the purchase decision. The economic buyer worries about return on investment. The technical buyer worries about integration. The user worries about workflow disruption.
- For each stakeholder, write the tailored version of the teach. The framing of the insight that lands for their concern. The same insight, translated three or five different ways.
- Identify the mobilizer, the internal stakeholder who will actively drive the purchase forward. If there is no mobilizer identified, the deal is at high risk of stalling. Equipping the mobilizer with materials to sell internally is the next step.
- Bring the map to the pipeline review. The manager's coaching question is whether every stakeholder has a tailored version, and whether the mobilizer is equipped to drive the deal forward.

Every complex deal has a stakeholder map produced by the rep before the second customer meeting. The map is reviewed weekly. Deals with a named and equipped mobilizer close faster than deals without one. Stalled deals get diagnosed against the map.

5. Discount Discipline Review

Discount discipline is the fastest test of whether reps are taking control. Challengers close deals at prices roughly ten to fifteen percent higher than Relationship Builders in the same accounts, and the gap shows up in the discount pattern. This review extracts the discount granted on every closed deal and compares patterns across reps, exposing where take-control coaching is needed. Use it monthly with the head of sales, when overall gross margin declines and the cause is unclear, or when a specific rep's win rate is high but average deal size is low.

How it works:

- Pull the last quarter's closed-won deals. For each, extract the discount granted from list price, the point in the sales cycle where the discount was conceded, and the specific reason recorded in the CRM.
- Group the deals by rep. Calculate each rep's average discount rate, the distribution of discount reasons, and the pattern of where in the cycle the discount was conceded.
- Identify the reps whose discount pattern is above the team average. Review three specific deals per rep to understand what the customer said and how the rep responded.
- For each above-average discounters, identify the specific coaching topic. Is the rep conceding discount as a first response, is the rep skipping the walk-away option, is the rep failing to hold the New Way stage before conceding? Match the topic to the specific behavior.
- Coach the rep on named live deals in the coming month. Track the discount pattern the following quarter to measure change.

The team's discount pattern tightens. Above-average discounters move toward the team norm within two quarters. Gross margin on closed deals improves. Reps develop a shared vocabulary for taking control in the specific moments the customer asks for concessions.

6. Manager Coaching Cadence Redesign

The book's most consequential argument is that the manager change matters more than the rep change, because reps default to whatever behavior their frontline manager rewards. Redesigning the manager coaching cadence, from generic pipeline review to specific Challenger-behavior coaching on named deals, is the highest-leverage change most sales organizations can make. Use it before or alongside any rep-level Challenger training, and use it when training investments have not produced behavior change, which is usually a manager problem rather than a rep problem.

How it works:

- Establish a weekly one-on-one cadence of thirty minutes per rep, focused on specific pipeline deals. Not generic development. Not skill building in the abstract. Named deals with named next steps.
- Structure each one-on-one around three Challenger questions. What insight did the rep bring to the last conversation on this deal, which stakeholder did the rep tailor for, where in the process did the rep take control or fail to take control.
- Retrain the managers on how to ask and respond to the three questions. This is not intuitive and it is different from what most sales managers currently do. Two half-day sessions with role-play is the minimum.
- Track the manager's coaching activity. Number of one-on-ones held, share focused on named deals, share of time spent on each of the three Challenger behaviors. Managers who slip back into generic activity coaching need additional support.
- Review the coaching activity monthly with the head of sales. The head of sales coaches the managers on their coaching, using the same three-question structure.

The weekly one-on-one cadence is held consistently across managers. The coaching questions focus on Challenger behaviors on named deals. Reps report in surveys that the coaching is useful. Rep behavior in customer conversations shifts within two quarters, measured by call recording review.

7. Insight Content Ratio Audit

CEB's finding that fifty-three percent of B2B customer loyalty is driven by the sales experience, and specifically by teaching the customer something new, is a direct budget-allocation argument. This audit measures the ratio of product-feature content to insight content produced by marketing in the last quarter. Most companies find the ratio inverted, and the audit exposes the gap. Use it as an annual marketing and product-marketing review, or when the sales team consistently complains that marketing content is not useful in customer conversations.

How it works:

- Pull every piece of marketing content produced in the last quarter. Blog posts, white papers, sales enablement materials, webinars, case studies.
- For each piece, classify it as product-feature content (describes what the product does), insight content (teaches the customer something new about their own business that leads back to the seller's unique capability), or neither (brand content, general thought leadership).
- Calculate the ratio of product-feature content to insight content. Compare against a target ratio of at least one-to-one, and ideally with insight content the majority.
- For the top three customer segments, note the specific insights that content supports, and whether each meets the four properties. Insights that fail two or more properties are candidates for retirement or rewrite.
- Publish the audit to the marketing and sales leadership. Propose a reallocation for the coming quarter and set a target ratio. Measure whether sales-conversation quality and win rates change over the following two quarters.

Marketing content shifts toward insight content over two to three quarters. Sales reps report using more marketing content in customer conversations. Win rates against low-cost competitors improve. The marketing and sales conversation stops being about lead-flow metrics and starts being about content that lands with buyers.

Further Research

- Neil Rackham's SPIN Selling, the twelve-year Huthwaite research project on successful sales calls, and the closest academic antecedent to the Challenger study. Rackham wrote the foreword to The Challenger Sale endorsing the finding. [\(link\)](#)
- The Challenger Customer, the 2015 CEB follow-up that applies the framework to the buyer side and introduces the mobilizer concept as the specific stakeholder whose engagement predicts deal close. [\(link\)](#)
- The Effortless Experience, the 2013 CEB book applying similar research methodology to customer service, with a finding that reducing customer effort drives loyalty more than delighting customers does. [\(link\)](#)
- Challenger Inc., the training and consulting firm spun out of CEB that owns the Challenger methodology today. The firm's website archives updated playbooks, benchmarks, and case studies from Challenger adoptions. [\(link\)](#)
- Dave Kurlan's critiques of the Challenger methodology, published on the Objective Management Group blog, which raise methodological concerns about the five-profile factor analysis and offer the most credible sales-training-industry counterargument. [\(link\)](#)

Related Books

- **SPIN Selling**, Neil Rackham. The twelve-year Huthwaite research project on successful complex sales calls. Rackham's SPIN framework is the closest academic antecedent to the Challenger study and he wrote the book's foreword.
- **The Challenger Customer**, Brent Adamson, Matthew Dixon, Pat Spenner, and Nick Toman. The 2015 CEB follow-up that applies the framework to the buyer side and develops the mobilizer concept as the internal stakeholder who drives the deal forward.
- **The JOLT Effect**, Matthew Dixon and Ted McKenna. Dixon's 2022 book on closing deals under high buyer indecision, using natural-language-processing analysis of 2.5 million sales calls. It extends the Challenger research into the current buying

environment.

- **To Sell Is Human**, Daniel H. Pink. Pink's argument that everyone is in sales under information parity, with a serving-oriented framework that reads as the natural counterpoint to Challenger. Reading both together clarifies where each applies.
- **Never Split the Difference**, Chris Voss. The former FBI negotiator's operating manual on high-stakes negotiation. Voss's tactical treatment of taking control and holding price complements the take-control chapter of Challenger.
- **New Sales Simplified**, Mike Weinberg. The most practical operator's guide to outbound prospecting in complex B2B. Weinberg's field playbook fills the gap Challenger leaves at the top of the funnel, before the Commercial Teaching pitch begins.
- **The Sales Acceleration Formula**, Mark Roberge. The former HubSpot CRO's data-driven playbook for building and scaling a sales team. Roberge's operating framework pairs well with the Challenger model on hiring, training, and management design.

These summaries present Bruce Eckfeldt's analysis of business and leadership books for founder-CEOs and leadership-team members of growth companies. Each one identifies the ideas most relevant to decision quality, strategy, and leadership capacity, notes where the evidence is weak, and suggests practical ways to test what is worth testing. All ideas, stories, and quotations belong to the original author and to the people they cite. The assessments and recommendations are Bruce's. It is a companion to the book, not a substitute for reading it.

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