

The background image is a dramatic landscape. On the left, a large, bright lightning bolt strikes down from a dark, stormy sky. The sky is filled with heavy, grey clouds. In the foreground, a lone, large tree stands in a field of dry, brown grass. The tree is silhouetted against the lighter sky. The overall mood is one of tension and risk.

To Challenge or **Not to Challenge?**

The Hidden Psychology
Putting Your Revenue at Risk

Corporate Visions

Rethink the Rule Book

You've heard it a thousand times: "Always be challenging." "Disrupt the status quo." "Provoke your prospects." It's the mantra of B2B sales, repeated so often it might as well be tattooed on every salesperson's forehead.

But what if that venerated advice is very wrong?

Well, not completely wrong. But definitely not always right.

Imagine a doctor prescribing the same treatment for every patient, regardless of their condition. It sounds absurd, but that's akin to what most B2B companies do when they apply one-size-fits-all messages to every moment in the customer lifecycle.

Here's the inconvenient truth:

- **Nearly two-thirds of companies don't differentiate their messaging** and content between customer acquisition and customer expansion.
- **Using a disruptive message with existing customers increases the likelihood that they'll leave you** by at least 10 percent.

If these facts surprise you, don't panic—you're about to get smarter about when to shake things up and when to steady the ship with your buyers.

In this e-book, you'll learn:

- When (and how) to be disruptive to break through the status quo.
- Why challenging existing customers can backfire, and how to reinforce your value instead.
- The art of evolving with your customers to tap into new opportunities without rocking the boat.

In B2B sales, it's not about who disrupts the most—you need to understand your buyer's situation and apply the right message at the right time. Dig into the insights in this e-book, and make sure you're not bringing a wrecking ball to a housewarming party.



Tim Riesterer

Chief Strategy Officer
Corporate Visions



Understanding Status Quo Bias

Ever wonder why that promising deal suddenly went cold? Or why customers stick with you despite your competitors' best efforts?

The answer lies in a psychological phenomenon called Status Quo Bias.

Status Quo Bias is a person's innate preference for not doing something different from what they're doing today. It's not laziness or stubbornness—it's a documented cognitive bias that affects decision making across all areas of life—including B2B sales.

Status Quo Bias was first identified by researchers William Samuelson and Richard Zeckhauser in 1988. Since then, decades of peer-reviewed studies and experiments have shown that, when faced with a decision, people disproportionately stick with the status quo.

It's almost too easy to paint the status quo as the archnemesis of sales. Sellers might envision themselves valiantly pushing prospects toward a better path, while Status Quo Bias looms against them like an invisible adversary, doggedly repelling every attempt.

But **Status Quo Bias isn't always the enemy.** In fact, our behavioral research studies reveal how Status Quo Bias plays different roles for sellers depending on the situation.



Customer Acquisition

In customer acquisition conversations, you're up against the status quo. Your prospect is predisposed to resist change. And to overcome that resistance, you need to disrupt their Status Quo Bias.



Customer Retention

In customer retention conversations, you are the status quo—so the last thing you want to do is disrupt it. In these situations, you need to reinforce your value and make Status Quo Bias work in your favor.



Customer Expansion

In customer expansion conversations, you walk a tightrope. You're the status quo, but you're also proposing change. The key is to make change feel like a natural evolution rather than a disruption.

It's vital to understand these situational differences. The disruptive tactics that work wonders for new customer acquisition can backfire spectacularly when you're trying to keep and grow existing customers.

A dramatic landscape featuring a lone, leafy tree standing in a vast, golden-brown field. The sky is filled with dark, heavy clouds, and a bright, jagged lightning bolt strikes down from the upper left. The sun is low on the horizon, creating a warm, orange glow that illuminates the clouds and the field. A thin, white, curved line arcs across the sky, starting from the top left and ending near the tree. The overall mood is one of power and solitude.

Match Your Message to Your Buyer's Situation

Challenging your buyers is the right approach sometimes, but not every time. In this e-book, you'll see how Status Quo Bias plays out differently across the customer lifecycle. And you'll get research-backed frameworks for crafting a message that matches your buyer's motivations in each moment.

- ▶ Disrupt the Status Quo to Win New Business
- ▶ Reinforce Your Value to Keep Customers Loyal
- ▶ Evolve Together to Tap into New Opportunities

Match Your Message to
Your Buyer's Situation

▶ **Disrupt** the Status Quo to Win New Business

Most sellers pitch features and benefits too soon, leading to commodity conversations and “no decision” outcomes. To be effective, you must first disrupt your prospect's current approach and make a compelling case for change.



It's Not You, It's Change

When a prospect takes your call—even if they reached out to you first—don't celebrate too soon.

They're probably not talking to you because they're ready to change. They're simply exploring whether change is necessary.

So, when you make your pitch, their first instinct isn't to marvel at your solution. Instead, they're mentally stretching their current approach, seeing if it can still meet their needs. It might not be perfect, but it's familiar. And they won't change if they can get by with what they already have.

That's why **at least 40 percent of deals in the pipeline end in "no decision."** Prospects don't see a compelling reason to change from their status quo, so they decide to do nothing at all.

How do you break through their Status Quo Bias?

Don't lead with all the wonderful benefits of your solution—that's all about you. Instead, illustrate the need to change by revealing gaps that are too wide for them to cross with their current approach.

You need to deliver a powerful, disruptive message that transforms your prospect's perception of the status quo from a safe harbor to a risky bet. In this moment, it's not about your solution—it's about making their current situation feel unsustainable.

We call this message Why Change.

How Do You Build a Buying Vision?



Rob Perrilleon
SVP Delivery Services

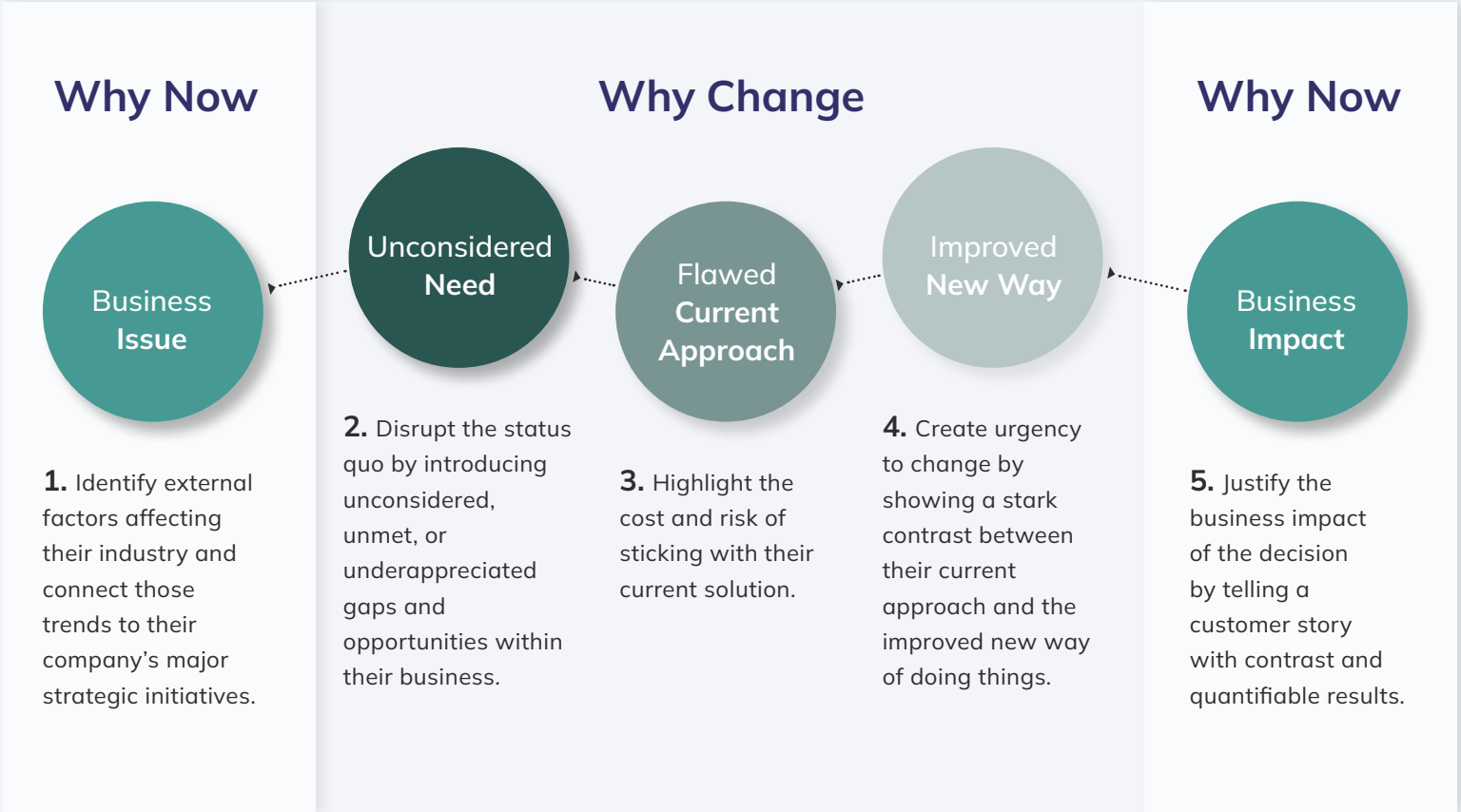
To convince new prospects to change from their status quo, you need to tell a story that highlights how unstable their present situation is.

► Learn more in this video:



The Why Change/Why Now Message

In the beginning, your prospects are asking, “Why should I change?” To answer that question, disrupt their status quo and add urgency to act with the Why Change/Why Now message.

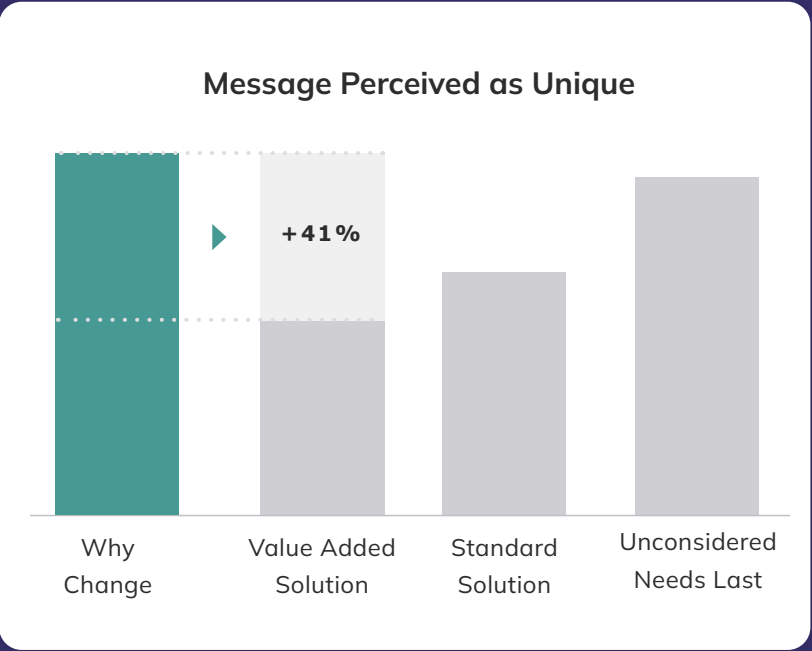


Now your prospect has a reason to care about and act on your solution. You’ve given them a compelling reason to change, and your unique strengths and capabilities are now an invaluable part of the path forward.

The Research Behind the Message

According to our research study led by behavioral expert Dr. Zakary Tormala, this Why Change message significantly outperforms other sales pitches.

B2B decision makers perceive the Why Change pitch as **up to 41 percent more unique** than other messages.



The Psychology of Acquisition

Why does the Why Change message work so well?

In his 2003 paper *The Psychology of Doing Nothing*, political scientist Christopher J. Anderson provides a detailed review of decision avoidance behaviors, including Status Quo Bias. Building on earlier research, **Anderson's work highlights four key factors that contribute to people's natural resistance to change.**

The Four Causes of Status Quo Bias

Preference Stability – If your buyer's preferences change less often, or remain static, they're more likely to stick with what they're doing today.

Anticipated Regret/Blame – Humans chafe at the possibility of regret. It elicits all sorts of negative anticipatory emotions such as fear, dread, and anxiety. While the consequences of actual regret will play out in the future, the emotional experience of regret takes place in the present.

Cost of Action/Change – Changing the status quo often involves a cost of some kind—the transactional costs associated with the change, or the transitional resourcing costs of changing to something new. Change seems risky or costly, while sticking with the status quo registers as neutral or beneficial—even in the face of contrary evidence.

Selection Difficulty – When prospects are overwhelmed with too many options and too little contrast among those options, everything seems to look alike. This amplifies their tendency to view change as complex and cumbersome.

How to Defeat Them



Destabilize Preferences – Introduce Unconsidered Needs that challenge your buyer's current preferences.



Flip the Risk Equation – Highlight the risks and potential regrets of not changing. Paint a vivid picture of the negative consequences of maintaining the status quo, making inaction seem riskier than change.

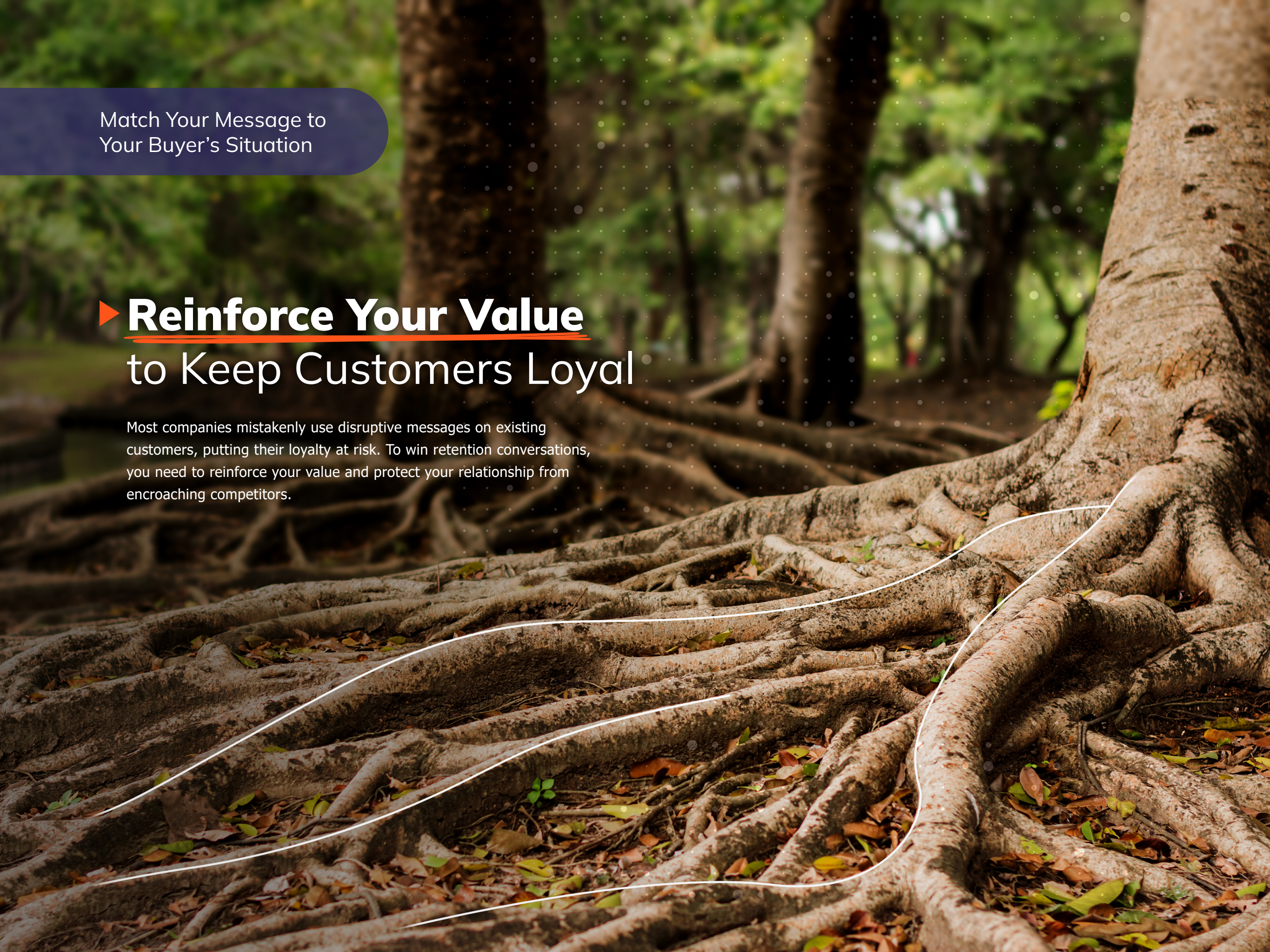


Emphasize Hidden Costs – Reveal the unseen costs of their current approach. Demonstrate how the apparent cost of change is outweighed by the ongoing costs and missed opportunities of doing nothing.



Create Contrast – Clearly differentiate your solution from both the status quo and other options. Simplify their decision by showing a stark contrast between their current approach and your new, improved way.

With Why Change, you have a practical framework to defeat each of these four underlying causes and persuade your prospects to change. But what happens after your prospect becomes a customer?



Match Your Message to
Your Buyer's Situation

► **Reinforce Your Value** to Keep Customers Loyal

Most companies mistakenly use disruptive messages on existing customers, putting their loyalty at risk. To win retention conversations, you need to reinforce your value and protect your relationship from encroaching competitors.

Don't Leave Churn to Chance

Here's a stat that might surprise you: **70–80 percent of most companies' revenue comes from existing customers.**

That's right, your current customers are the unsung heroes of your bottom line, quietly powering your business through renewals and upsells.

Yet, **nearly 60 percent of commercial leaders think they can use the same sales approach for both new prospects and existing customers.** That's like using the same conversation starter with a stranger and a longtime friend—it won't be effective in every situation.

Well, our research confirms that retention conversations require an entirely different approach.

When you're trying to win new business, you should be the disruptive voice of reason that shakes things up. But when you're trying to renew existing customers? It's time to change tack.

With existing customers, you're not the insurgent anymore—you're the trusted incumbent partner they've come to rely on. And while that might sound like a comfortable position, don't be lulled into a false sense of security. Your competitors are out there, making new promises, trying to lure your customers away.

How do you remind your customers that staying with you is not only safe, but smart? **You need to deliver a message that reinforces your value and shows them that you're still the best solution to meet their goals.**

We call this message Why Stay.

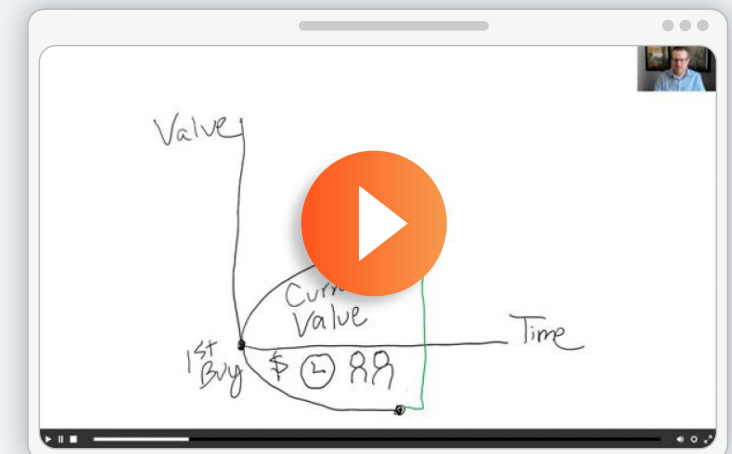
Leverage Your Incumbent Advantage



Doug Hutton
EVP Customer Experience

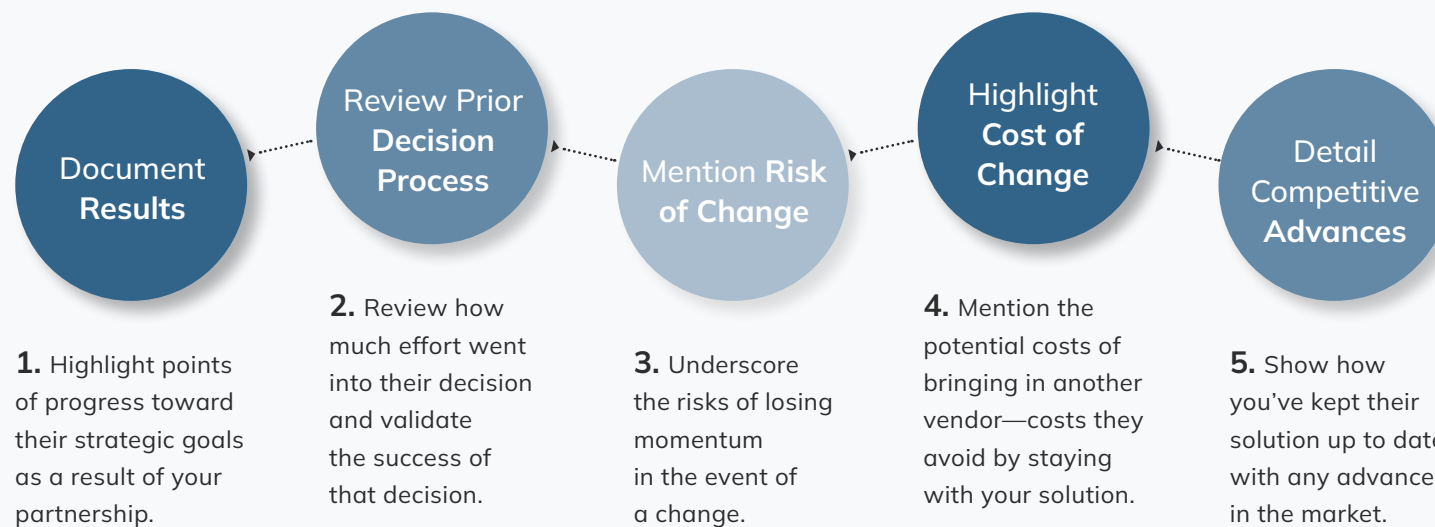
Just like in politics, it's not easy to displace an incumbent because of all the advantages they have. Now that you're the status quo, you can leverage those advantages in your retention conversations.

► Learn more in this video:



The Why Stay Message

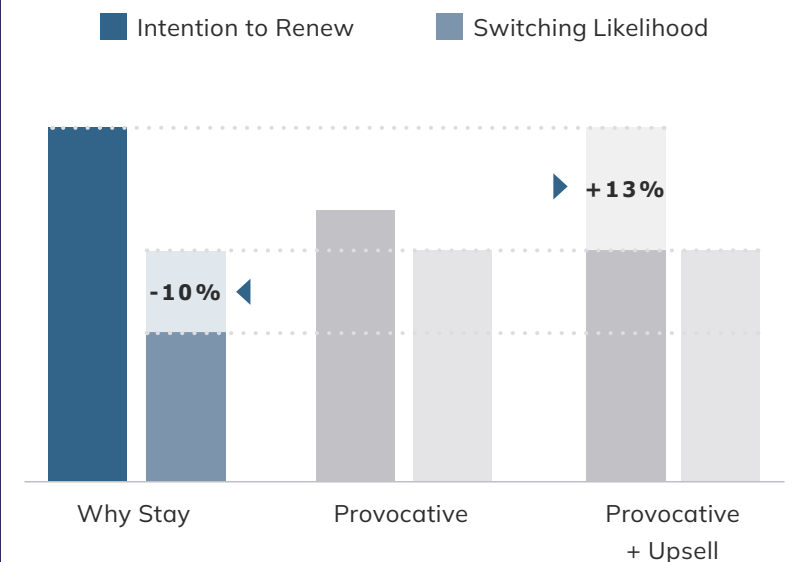
When you're trying to persuade an existing customer to renew, using the Why Stay message shows them the progress they've made with your solution while reinforcing your value as their status quo.



Notice the difference between the Why Stay message and Why Change? Remember, you're now the status quo, so the last thing you want to do is displace yourself!

The Research Behind the Message

According to a research study led by behavioral expert Dr. Zakary Tormala, the Why Stay message led to a **13 percent boost in intention to renew** and buyers were **10 percent less likely to switch or shop around** compared to more provocative, disruptive messages.



The Psychology of Retention

Here's how the Why Stay message plays to the four causes of Status Quo Bias.

The Four Causes of Status Quo Bias

Preference Stability – If your buyer's preferences change less often, or remain static, they're more likely to stick with what they're doing today.

Anticipated Regret/Blame – Humans chafe at the possibility of regret. It elicits all sorts of negative anticipatory emotions such as fear, dread, and anxiety. While the consequences of actual regret will play out in the future, the emotional experience of regret takes place in the present.

Cost of Action/Change – Changing the status quo often involves a cost of some kind—the transactional costs associated with the change, or the transitional resourcing costs of changing to something new. Change seems risky or costly, while sticking with the status quo registers as neutral or beneficial—even in the face of contrary evidence.

Selection Difficulty – When prospects are overwhelmed with too many options and too little contrast among those options, everything seems to look alike. This amplifies their tendency to view change as complex and cumbersome.

How to Reinforce Them



Validate Preferences – Remind customers of the careful decision-making process they went through when choosing you. Reinforce the wisdom of their original choice and how it aligns with their long-term goals.



Mitigate Regret – Highlight the potential risks and uncertainties of switching to a new provider. Emphasize the trust and reliability you've built together, making the idea of change seem unnecessarily risky.



Underscore Sunk Costs – Draw attention to the investments (time, money, effort) they've already made in your solution. Show how these costs are now part of their operating model, making change seem more expensive.



Simplify Continuity – Make staying with you the easiest choice. Demonstrate how you've kept pace with market changes, so there's no need to go through the complex process of evaluating other options.

Now you know how to reinforce Status Quo Bias and retain more customers. But how do you evolve the relationship without jeopardizing the trust you've built?



Match Your Message to
Your Buyer's Situation

► Evolve Together to Tap into New Opportunities

Sellers often struggle to expand relationships, either playing it too safe or pushing too hard. These conversations require a delicate balance of nudging customers toward growth opportunities while maintaining trust and stability.

Upsell Without Upheaval

Remember when your customer's executives green-lit the partnership? They weren't just buying your solution—they were making an investment toward their strategic goals.

But if you're not continually demonstrating your value and showing how staying with you keeps them competitive, you might as well be holding the door open for the competition.

This is a tricky conversation to navigate. You need to **offer your customer new insights that open up the possibility of change. But you can't disrupt the relationship so much that they want to shop around.**

The goal is to make your customer feel safe and assured that they're already working with a partner who can help them solve new challenges and pressures as they arise. They'll stay competitive, and they won't need to look elsewhere.

Even if your customer isn't ready to act on your ideas immediately, you've planted the seed. When it blooms, they'll remember you were the forward-thinking partner who saw it coming. That bolsters the barrier around your relationship and opens up more opportunities for growth.

How do you offer new insights without disrupting the relationship too much?

You need to deliver a message that persuades your customer to evolve—embrace change, but only as a logical next step to further their goals.

We call this message Why Evolve.

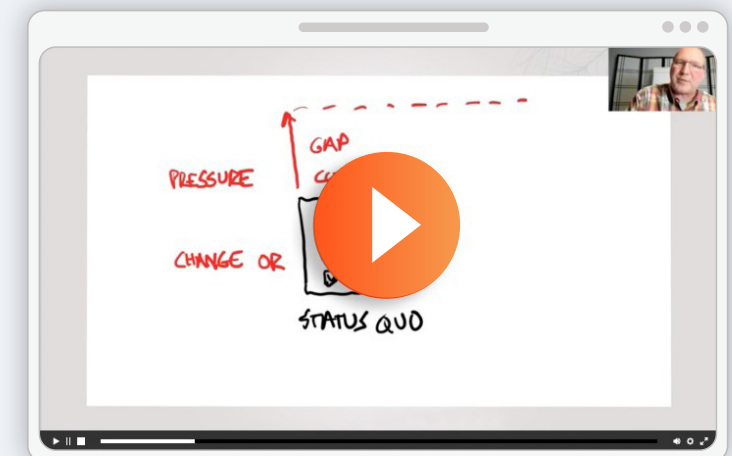
From “Or” to “And”



Paul George
Senior Consultant

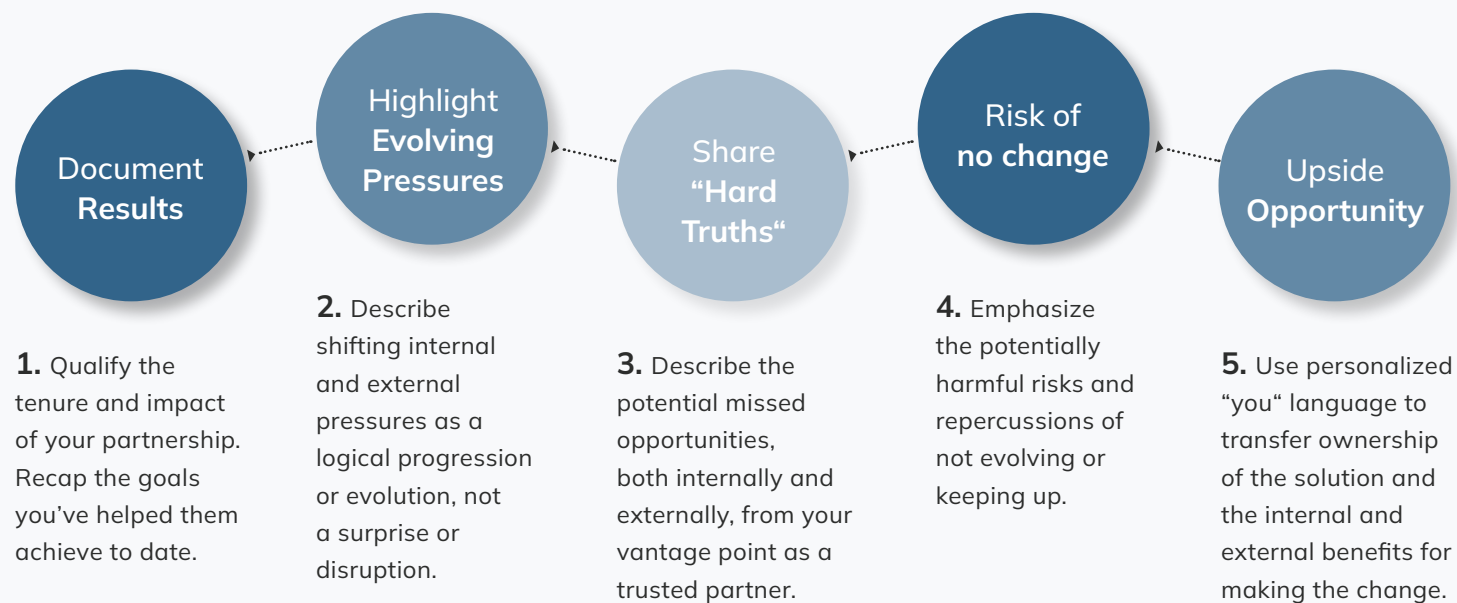
Your competition will continue to challenge your position as your customer's status quo. If you're not showing them how they can stay with you and stay competitive, you risk losing the relationship.

► Learn more in this video:



The Why Evolve Message

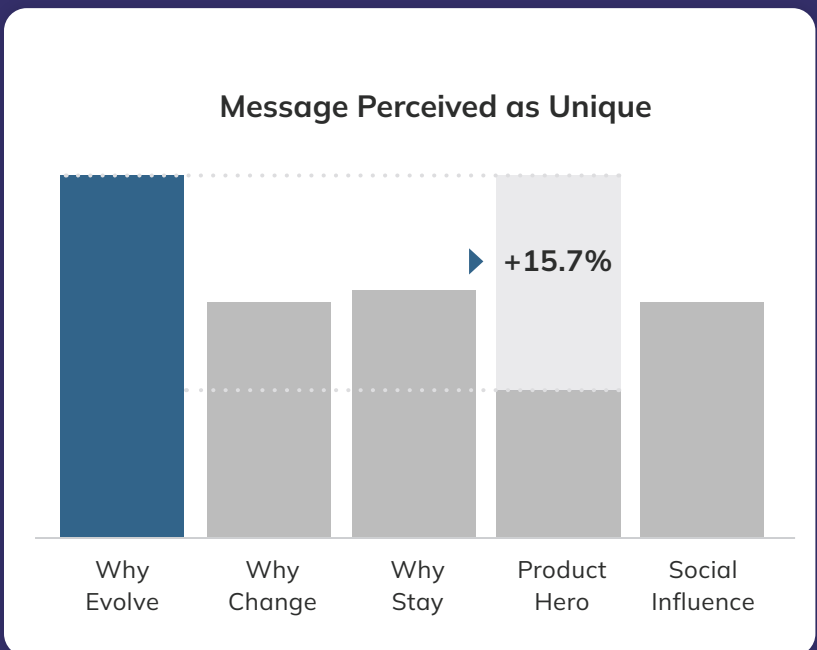
The goal of the Why Evolve message isn't to drive a big change, nor is it to get your customer to renew an existing solution. It's a hybrid message that inspires them to embrace your new offerings with confidence and enthusiasm.



Why Evolve is essentially about controlling change. It includes elements of a provocative customer acquisition message (Why Change) and elements of the more protectionist customer renewal message (Why Stay).

The Research Behind the Message

According to a research study led by behavioral scientist Dr. Nick Lee, the Why Evolve message significantly outperformed other messages when trying to convince existing customers to purchase a new solution.



The Psychology of Expansion

Here's how the Why Evolve message weaves through the four causes of Status Quo Bias.

The Four Causes of Status Quo Bias

Preference Stability – If your buyer's preferences change less often, or remain static, they're more likely to stick with what they're doing today.

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Selection Difficulty – When prospects are overwhelmed with too many options and too little contrast among those options, everything seems to look alike. This amplifies their tendency to view change as complex and cumbersome.

How to Shift Them



Evolve Preferences – Show how your new offering is a natural progression of their current preferences. Position the change as an evolution (not a revolution), building on what they already value.



Frame Change as Proactive – Present the upgrade as a way to prevent future regrets. Illustrate how evolving with you now can help them stay ahead of industry changes and avoid falling behind competitors.



Highlight Efficiency Gains – Demonstrate how the cost of evolving is offset by increased efficiency or new capabilities. Show how this natural next step leverages their existing investment while opening new opportunities.



Guide the Choice – Present the evolution as a tailored option that fits their specific needs. Simplify the decision by showing how this choice builds logically on their current solution, reducing selection difficulty.

Now you know how to present change as a natural progression, building on your existing relationships while introducing new value in a non-threatening way.



Match Your Message to Your Buyer's Situation

Remember that old chestnut about always challenging the status quo?

Now you know better.

The most successful sales reps deliver the right message at the right time. They can be the disruptive force that breaks through the status quo, the steady hand that reinforces value, or the trusted guide that evolves the relationship.

Challenging your buyer plays well when you're the outsider trying to win new business. But it shouldn't be applied universally—no matter how popular that approach might be.

▶ **Disrupt Your Prospect's Status Quo**

To win new business, you need to shake things up. Develop a compelling Why Change message to overcome your prospect's natural resistance to change and position your solution as the best path forward.

▶ **Reinforce Your Value to Keep Customers Loyal**

With existing customers, disruption is your enemy. Develop a Why Stay message to reinforce your value, strengthen your position as the status quo, and keep competitors at bay.

▶ **Evolve Together to Tap into New Opportunities**

Expanding relationships requires a delicate touch. Create a Why Evolve message to guide your customers toward new solutions and opportunities without undermining the trust you've built and pushing them away.

Author



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Tim Riesterer, Chief Strategy Officer at Corporate Visions, is the sought after expert on evidence-based revenue growth using counterintuitive approaches. Known for his candid thought leadership and engaging keynotes, he’s spent decades testing and refining go-to-market strategies that put buyers squarely at the center. Tim is the author of four insightful books, including *Customer Message Management*, *Conversations that Win the Complex Sale*, *The Three Value Conversations*, and *The Expansion Sale*.

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About Corporate Visions

Corporate Visions is the leading provider of evidence-based revenue growth solutions for sales, marketing, and customer success. Global B2B companies partner with Corporate Visions to enable their commercial teams with the insights, training, tools, and technology they need to achieve superior results.

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