

# The Pattern of Engagement In High Value Sales Campaigns

Based on

The Pattern of War  
by

Lt General Sir Francis Taker KCIE CB DSO OBE  
(1894-1967)



By

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## **Introduction**

### **Who was he?**

After Serving as a Captain in the Royal Gurkha Rifles in the First World War, Lieutenant General Sir Francis Tucker commanded the Fourth Indian Division of the Eighth Army during the victorious campaign in North Africa and Italy in The Second World War. He ended his career in 1948 as General Officer Commander in Chief Eastern Command India. He retired in 1948.

In his Book “The Pattern of War” Lt General Sir Francis Tucker sets out to show that warfare of all ages no matter what armaments are used follows a definite and unchanging pattern. Tucker illustrates this with discussions of campaigns from Alexander to Hitler, and makes, what turned out to be, highly intuitive predictions concerning potential nuclear engagements and the dominance of air superiority.

Tucker’s “Pattern of War” can also be applied to sales situations, and you must understand the type of campaign in which they are involved; Linear, Area, and Siege.

This white paper will show the relative virtues and drawbacks of these campaigns depending on whether you are attacking or defending, and how to change from one type to another in order to gain advantage.

In the process of describing the types of engagements you will also learn the definitions and roles of different forces. They are divided into; The Mobile Arm, The Arm of Defence, and The Siege Arm. These roles apply to the sales world in terms of what type of forces you need to use in order to gain new customers against opposition, defending against your competitors’ moves against your customer base, and attacking your competitors’ customer base.

## What does Taker's Pattern Teach?

### Types of Engagements

Taker shows us that there are three types of engagements; Linear, Area, and Siege.

**Linear Engagements** occur when an attack is launched against a static linear defensive position, prepared in advance and offered as a point of engagement by the prospects in order to force the vendor to expend his forces in the least favourable way, and with no room for manoeuvre.

Linear Engagements are an attempt by a prospect to use a *defensive* position *offensively*. They differ from a siege in as much as they are used to actively force an engagement with the vendor in a specific area or fashion. It requires the prospect to make his defensive deployment in the path of the vendors either actively or by placing them around a point that the prospect believes the vendor will want to capture or engage. They represent the initiative lying with the prospects.

**Area Engagements** occur when a vendor is able to change position and direction of attack in order to seek advantageous circumstances that most favour the vendor's strengths, and refuse to engage where the vendor would be weakest, or the prospect strongest.

These are campaigns of manoeuvre. They come about as a result of the vendor using varying degrees of speed of movement, and/or secrecy of movement, to gain a position of local advantage against an opponent and thereby force their opponent to fight at a disadvantage.

Area Engagements are far more fluid than linear engagements, and are initiated by a seizure of the initiative by an attacking protagonist, rather than by a defensive plan which is the prospect's initiative.

**Siege Engagements** are actions by a vendor against heavily defended static positions, which are isolated points rather than part of an interconnected linear attempt to buy. They also differ from linear defences in that they are not generally offered up as deliberate points of engagement by the prospects, in the Linear Defence the prospect actively seeks an engagement; but on the prospect's terms. In a Siege the defense is passive, and is more concerned with denying engagement than promoting it, the idea being to hold the vendor long enough to force them to give up rather than to attempt to get the best deal through engagement.

## Identifying Current Engagement

### Area vs Linear Campaigns

To know whether the Engagement before you is likely to be Area or Linear in its nature, Tucker gives the following three factors as determining the degree to which the engagement is likely to be an Area rather than a Linear Campaign:

*First condition. Flanks shall be tactically open or it shall be possible to create a flank by a break-in and break-through.*

*Secondly, the mobile arm shall be predominant.*

*Thirdly, that it shall be possible to administer the mobile arm to the point at which it will decide the battle and gain decisive victory.*

By weighing up the degree to which these three factors predominate the likely pattern of the engagement can be prepared for. So, if you are confident of finding an open flank or can break through the customer line with a large proportion of your forces being made up of highly mobile troops, who can show initiative but follow orders to an ultimate winning objective, then an Area Engagement will be available for you to exploit and impose your terms on the prospect. Conversely if you can find no weak flanks to the Linear defence, and are not able to break through decisively at a particular point in the defences, plus your troops are predominantly slow to move and take action, and your more mobile troops are difficult to control, then you will have little choice but to contend with a Linear Engagement on the prospect's terms.

Tucker's basic premise is that mobile Area Engagements interspersed with sieges of isolated defensive strongpoints are the predominate pattern for warfare, and give greater scope for a vendor to win a quick and decisive victory compared to what can be achieved in Static Linear Engagements. Area Engagements also allow leaders to apply their tactical skills, and can allow superior tacticians to beat a more powerful enemy. He therefore advocates when on the offensive to attempt to convert Linear Engagements into Area Engagements.

### Sieges

The difference between a Siege and a Linear Defence is that in the later the customer actively invites an attack against prepared defences with a known prize behind them, he intends to buy, and therefore seeks an engagement, but on his terms. In a Siege the customer is not interested, maybe has no budget, no intent to buy, or is occupied by your competition.

Sieges can be very long term affairs and should only be entered into when either time permits or necessity demands. If they are to be successful, a very detailed understanding of the strengths and weaknesses of the account is required.

Why attempt sieges? If strongpoints controlled by your competition they provide them with a source of supply (revenue), a source of (customer) recruits, a place from which to mount attacks (references), and a rallying point for defeated units (customer moral support).

## **The Types of Forces and their Roles**

Once you know what type of engagement you are in, you then must understand which side of the defences you are on. In a Linear Engagement are you helping man the defences or attacking the account? In a siege you will either be defending the position or attacking it. In an Area engagement both sides are likely to be maneuvering, although there may be local defensive engagements by either side where appropriate.

If you do not have the right type of forces at your disposal to match the type of engagement in which you find yourself, but your enemy has, then there is a good chance that you will loose the engagement. The reverse is also true.

Military forces throughout history have been comprised of between one and three of these components:

### **Arm of Manoeuvre**

It is the responsibility of the arm of maneuver to probe for openings, exploit local successes to maximize their impact, lay false tails for the competition, engage and destroy the opposition's Arm of Manoeuvre, and relieve sieges of friendly strongholds (reference accounts) by attacking the besiegers. And as stated above maneuver the enemy into a position where they must fight on ground of your choosing.

You must avoid dissipating the force of maneuver, concentration is key, and the arm of maneuver must not be split to defend strongpoints.

### **Arm of Defence**

The arm of defence must stand and fight, act as a rock against the enemy to blunt their resources and make them tire of the fight, blunt their morale, slow down their arm of maneuver, and defeat their arm of defence.

The arm of defence must man the defences of strongpoints, keep out enemy troops and sally out against the besiegers.

They must act as a strategic reserve to respond to enemy concentrations and thrusts, and mobile enough to cover a wide front without being tied to one location. Reference sites can be thought of as providing airfields to provide counter strikes.

### **Siege Train**

The Siege Train represents a specialist group experienced in reducing well defended accounts, it must be prepared to be self sufficient and closely surround the account, it must specialise in the grinding work of wearing down defences and cutting off access to an account by any approaching enemy. It takes constant vigilance, patience and determination.

## Why is the Pattern important to You?

### Why Seek Area Engagements?

#### Area Engagements

As an active salesforce you should favour Area Engagements as they confer an advantage of time to an vendor, whether successful or not, and may also confer an advantage of position which may compensate for having to compete with a more powerful competitor.

These confer the initiative on you the vendor. They can gain you entry past the prospect's defences, help to overwhelm a more powerful or entrenched competitor, and quickly confirm whether you stand to gain a fast victory or that you can never win in the short term (and should therefore be prepared to withdraw and look for another target).

#### Linear Engagements

Customers like Linear Engagements for three reasons:

1. They flatten out the differences in the vendors, meaning that simple binary decisions can be made, generally on price, which will be driven down by the vendors inability to differentiate themselves, ensuring that whoever wins will gain much less than otherwise possible.
2. They are often decided on by committee, so that no blame can be apportioned directly to any individuals for the possible failure of the chosen solution.
3. They rob the vendors of any initiative, thereby allowing the customer to decide on what areas are open to attack, and thereby control, to a great extent, the actions of the vendors.

Unless you helped the customer to construct the tender requirements you must try to convert Linear Engagements into Area Engagements. The reasons for this are three fold:

1. If you didn't help construct the tender, one of your competitors probably did.
2. Linear Engagements are controlled by the customer; they therefore remove the initiative from you.
3. They tend to focus on price over value. With the result that the price is driven down, driving down the value of any potential deal to you.

## How to apply the Pattern to Sales Situations:

### Basic Rules

#### The Strategy: Overcome the Linear Defence

Once again according to Sir Francis Taker in “The Pattern of War” there are three conditions necessary to bring about an area engagement, as set out previously:

1. Flanks shall be tactically open or it shall be possible to create a flank by a break-in and break-through.
2. The mobile arm shall predominate.
3. It shall be possible to administer the mobile arm to the point at which it will decide the battle and gain decisive victory.

Expanding on each of these:

1. You must be able to approach the enemy from an undefended position outside or at the edges of their main line of defence (a *flank*), or you must produce a flank by either overrunning a position in their defensive line (a *break-in*) and thereby be able to attack the prospects on either side of this break-in from a direction from which they were not expecting an attack (their now exposed flank), which leads to their line locally collapsing; opening up a way through for your maneuvering forces (this being a *break-through*).
2. You must launch your initiative with forces that are sales oriented; willing and able to engage and exploit the opportunities. Any group who may slow the initiative down must be in the minority and not the prime arm of engagement.

Your engagement team must see initiative and mobility of action as their prime driver. In business terms this means being willing and able to act to the limits of their capabilities, to grasp the initiative, and spread through an account rapidly looking for opportunities, and taking action to out maneuver the competition. They must be sales oriented and able to see opportunities before the customer or competition does, and then exploit that opportunity.

3. This means that the sales force must be able to be controlled but enabled to take decisions, either directly or through sales management without long delays whilst decisions are awaited from on high in the management structure. Management must be able to help guide and consult with the field force to ensure that the campaign goes to plan, and that all actions are coordinated.

It is important that the initiative is focussed and forced through, the initiative should have only one overall objective, and it is up to sales management to ensure that the sales team stays on plan. It must always be remembered that the plan is to further the sales opportunity at the expense of the competition and prospects, with the aim of closing the sale. No closure = no victory.

## The Tactics to Use to Produce an Area Engagement

### 1. Turn a Flank

In the words of Sir Francis Taker; “**No army that is weaker in the mobile arm can hold a linear field defensive position which has an open flank** or which can be penetrated”

Look for an open flank. Assuming that you can find a flank to turn, if you can, then you can convert the Linear Defence into an Area Engagement.

The “Flank” itself is the side edge of the prospects’ position, an *Open Flank* is a poorly or undefended area, allowing access to a wider area in the rear of the prospects’ position. So you are looking for an area at the edge of the prospects’ position which is either poorly defended or undefended. Flanks are usually located by reconnaissance and probing at the edges of the enemy position.

Gaining access to an open flank, called *turning a flank*, provides a route to further attacks from an unexpected quarter; this bestows the advantage of Surprise, the benefits of this being threefold:

1. The benefit of Morale. The prospects’ morale, and therefore psychological ability to react, plan, and control, will be reduced due to the shock of your surprise appearance.
2. The benefit of Time. If the prospects’ morale holds, the amount of time the prospects have to react and prepare to defend against your initiative will be minimised in direct proportion to your momentum.
3. The benefit of Position. When the prospects have used what little time they have to reposition against you they will have to do so by changing position to engage on a front of your choosing, which will put you at an advantage.

In summary turning a flank is a bold move, and must be unexpected in order to fully exploit the advantage of surprise, thereby maximising its chances of success. However, just turning the flank without exploiting surprise is not enough to win a victory. It will be the combination of your actions and the prospects’ reactions that guarantee or deny victory. If your actions do succeed, the results will be rapid and spectacular, *rolling up* the prospects position by position, and leaving the competition reeling in its wake. The key is to exploit your advantages to the fullest.

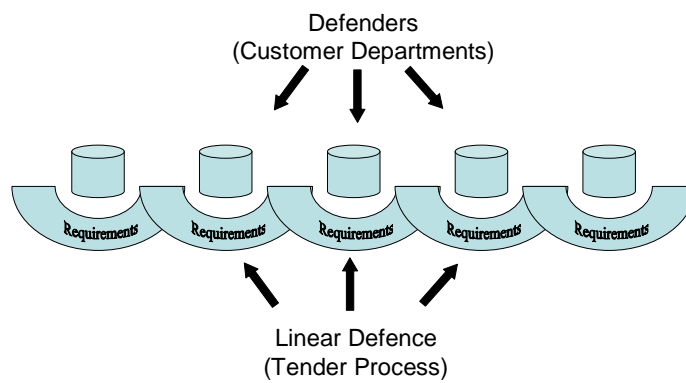


## Sales Example

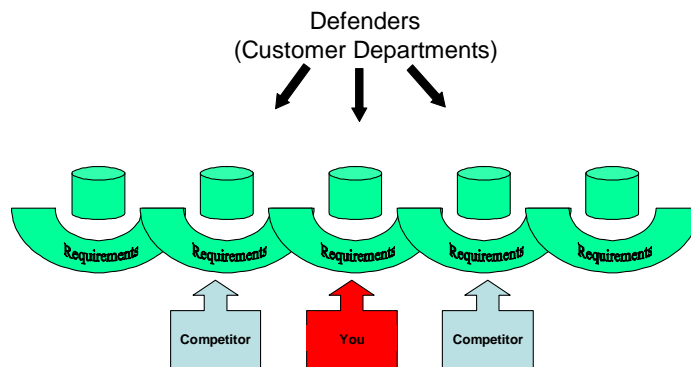
### Step by Step Explanation of Turning a Flank

#### Opening Positions

Customer sets out their Linear Defences for vendors to expend their energy against.

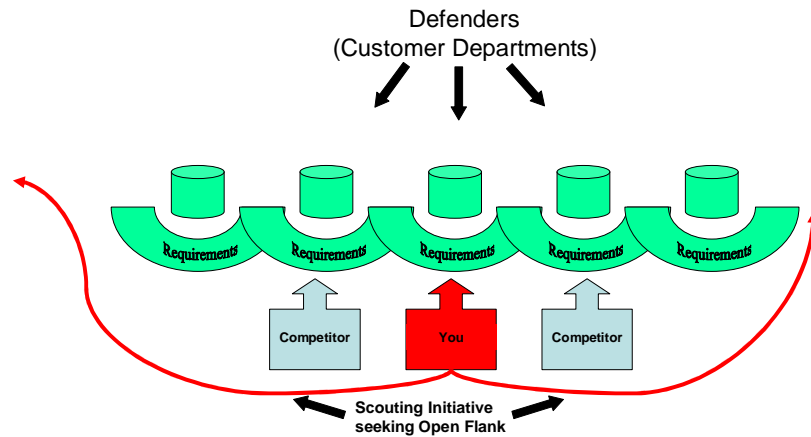


Vendors position to attack at against the prepared defences.

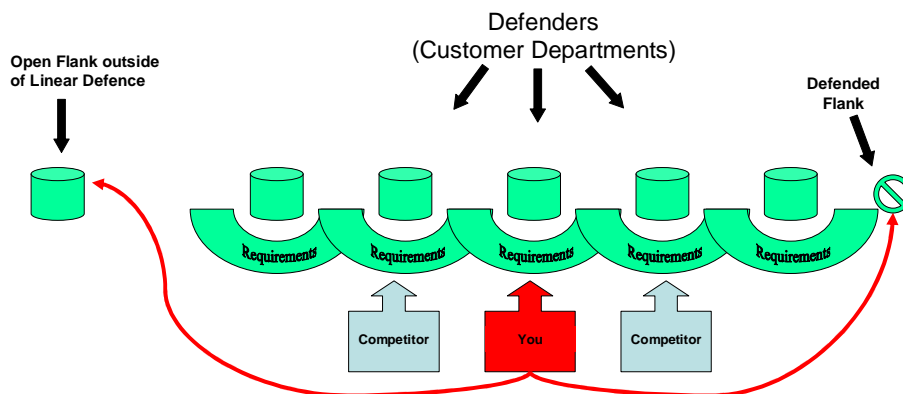


## Scouting

Whilst continuing to engage the Linear Defence in order to hide your other plans, send scouting parties to look for a flank that can be turned.

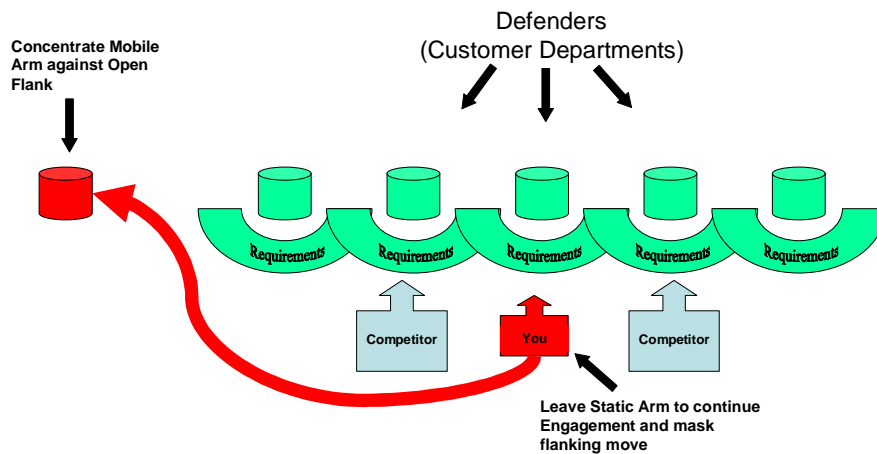


You may find that in some areas there is no open flank, whilst in others there are some opportunities, it is therefore important to spread far and wide to look for such opportunities but always as near to the main Linear Defence as possible.

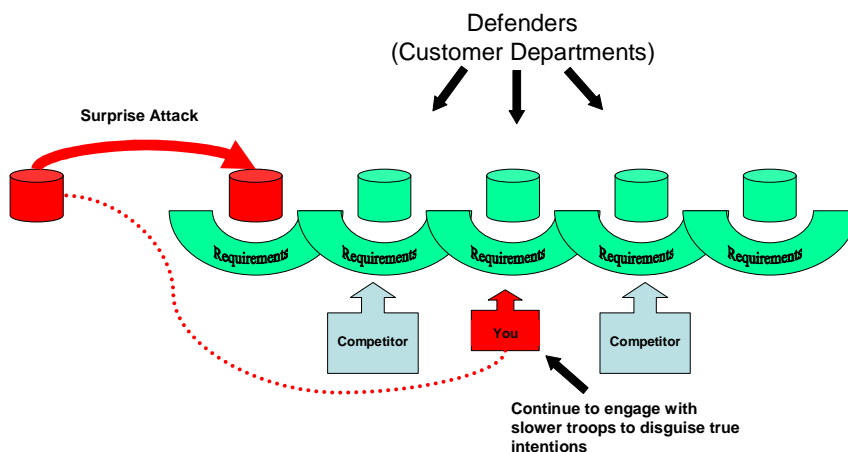


## Turning the Flank

Once an open Flank is found concentrate your mobile forces against it in order to turn it as quickly as possible, whilst still engaging the Linear Defence with your less mobile arm. Speed is important as the faster you turn the flank, the less likely it is that your competition or the prospects will be aware of what your true intentions are.

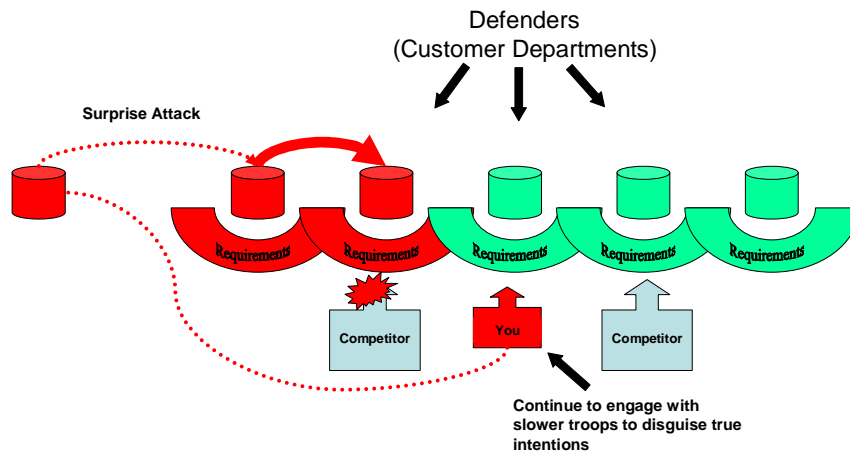


The momentum must be maintained, and the springboard provided by the collapsed flank must be utilised to allow a surprise attack from behind the Linear Defence, beyond the reach of your competitors. At the same time your more static troops should engage energetically with the Linear Defence, this will distract the prospects and your competitors from your flanking manoeuvre.

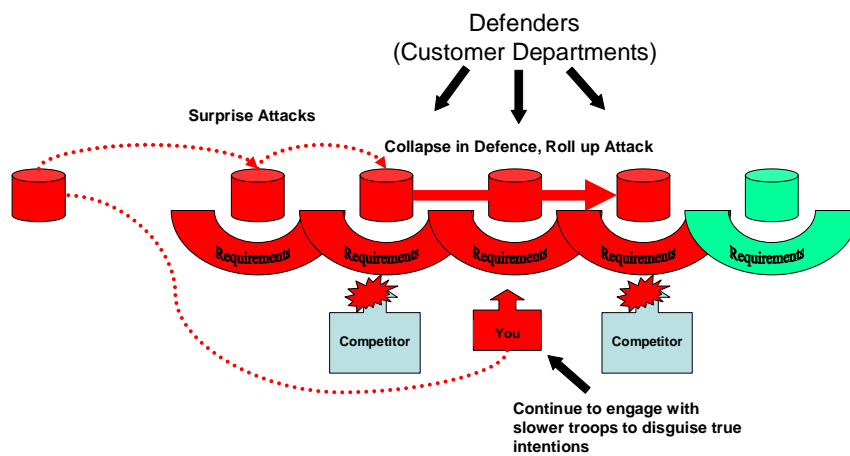


## Roll up Defensive Positions from Unexpected direction

Once one part of the Linear Defence is overrun unexpectedly, it will lead to other parts of the Linear Defence becoming weakened, and as they fall will negate the efforts of your competitors.

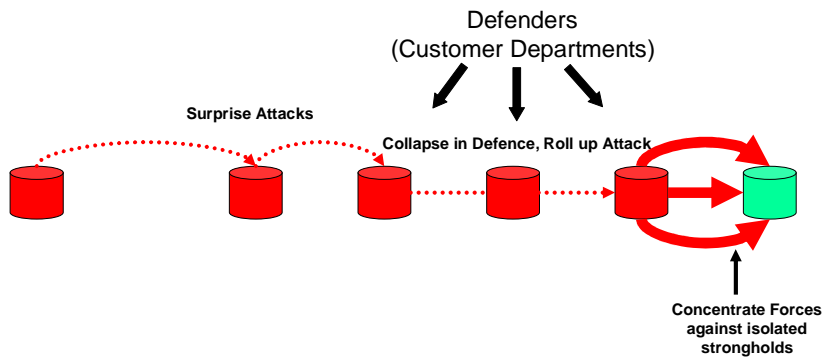


This will be multiplied as your success increase due to the collapse of the “will to fight” in the prospects.



## Mopping up

Once the rollup is achieved, it is then a matter of mopping up any lingering hostile departments at leisure until all resistance is overrun.



## 2. Break-in and Break-through in a Sales situation

In the words of Sir Francis Taker; **“No army that is weaker in the mobile arm can hold a linear field defensive position which has an open flank or which can be penetrated”**

The second way to turn a flank is to *create* the flank *in* the Linear Defence rather than outside of it. Mounting a break-in attack at a point in the Linear Defence, followed by a break-through does this. The vendor needs an overwhelming advantage in a particular area compared to the other vendors, and it must be seen as so important to the customer that their defences crumble and allow the breakthrough, which then allows your attack to take on other areas from a position of strength “behind the lines of the prospects, i.e. from an unexpected direction; an internal flank. It is often the sponsorship of customer factions in the breakthrough area that gives strength to these attacks. In battle it is the equivalent of the prospects seeing the unit next to them break and run in the face of the enemy, forcing them to fall back or risk being surrounded. Or in business terms if the faction which “collapses” during the breakthrough is seen as significant enough, then other areas will “collapse” in the face of the flank attack caused by the breakthrough.

This is different from the “scouting” exercises mentioned previously, as the point here is to fully engage the defences, not to simply reconnoitre them. But of course good reconnoitring could lead to the commander identifying a good point to launch this breakthrough movement.

If the vendor has planned ahead then they have a chance to subvert a particular point in the defences, or perhaps all of them. Getting to this position may not be as hard as it sounds. Most Linear Defences are not homogenous, contain inconsistencies, gaps, and conflicting agendas, the important thing is for the vendor to have had the opportunity to get to see the defences before attacking them, preferably from behind their lines. If he can get forces into them or turn the loyalty of the prospects in a particular area before the attack then so much the better.

This is a matter of account penetration and influence prior to the tender, here you have the chance to set the agenda, and thereby subvert the defences in your favour.

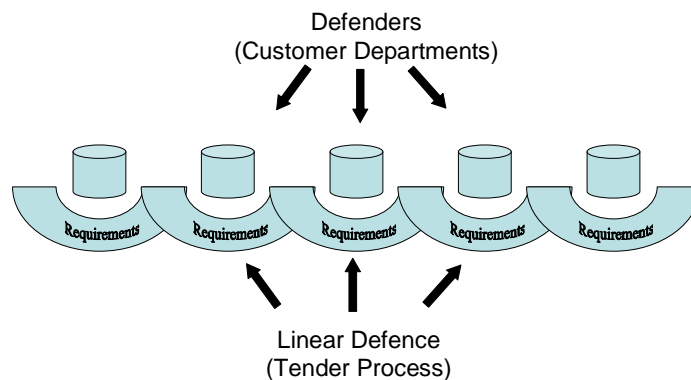
To do this it is necessary to “help” write the tender. Any vendor who receives a tender without having been involved in writing it for the customer should ask themselves who did help write it, reading it should probably make this plain.

Getting to this position is not as hard as it sounds. Most tenders are written by committees, so often end up with inconsistencies, repetitions, and contrary agendas, the important thing is for the vendor to have had the opportunity to get to see the defences before attacking them, preferably from behind their lines. If he can get resources into them to gain the loyalty of the prospect in a particular area before the engagement then so much the better. This is a matter of account penetration and influence prior to the tender, here you have the chance to set the agenda, and thereby subvert the defences in your favour.

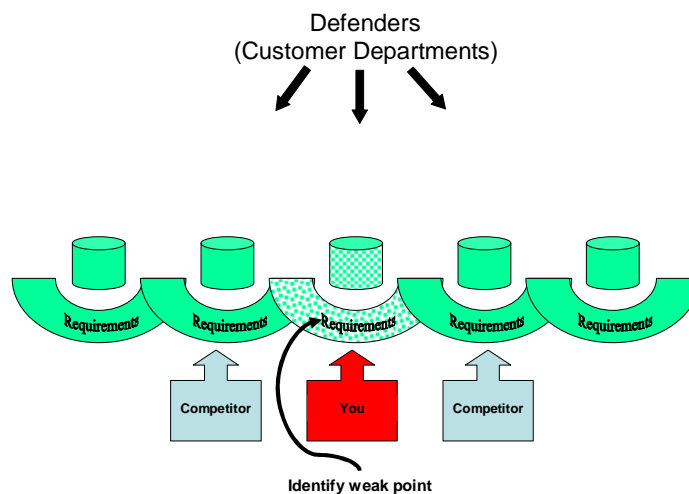
## Step by Step Explanation of Break-In and Break-Through

### Opening Positions

As usual the customer sets out their defences to absorb the vendors' attack.

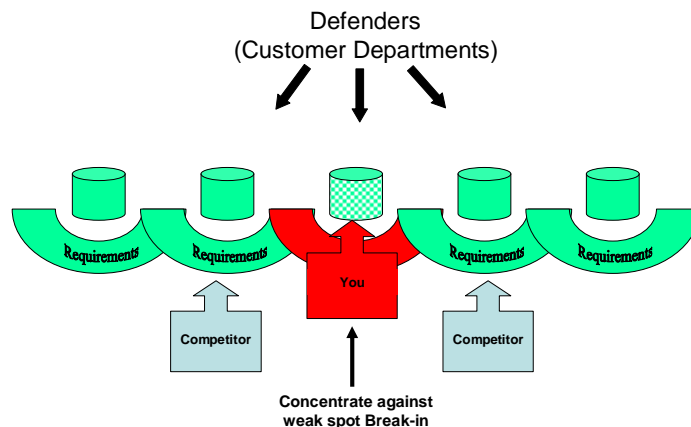


It is necessary to identify or create the weak point. Optimally it should be created by prior preparation, i.e. you should create it by involvement in the creation of the tender. Alternatively you may find a weak point as part of a scouting exercise.



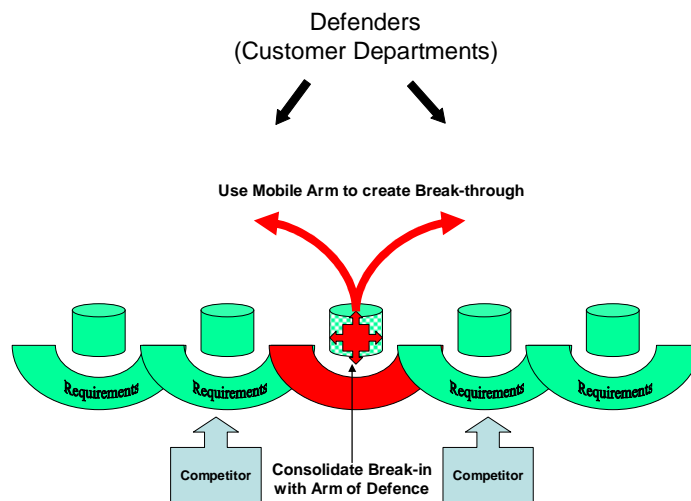
## Break-In

Having identified the weak point you must concentrate all your force against it to ensure a rapid collapse of the weak defences, and create a Break-in in the defences.



## Break-through

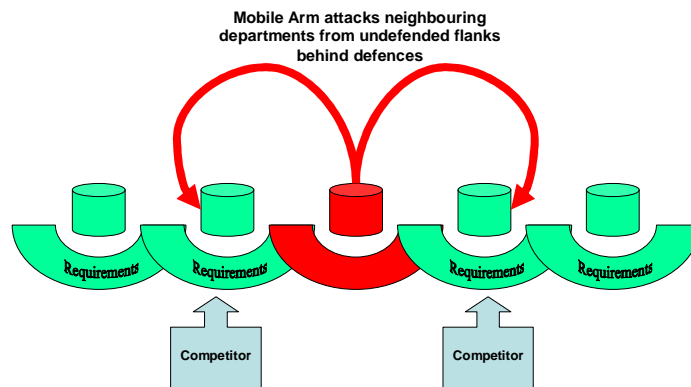
Having broken in to the defensive lines only the less mobile Arm of Defence should be left to hold the gap, the Mobile Arm must immediately be used to turn the Break-In into a Break-Through.





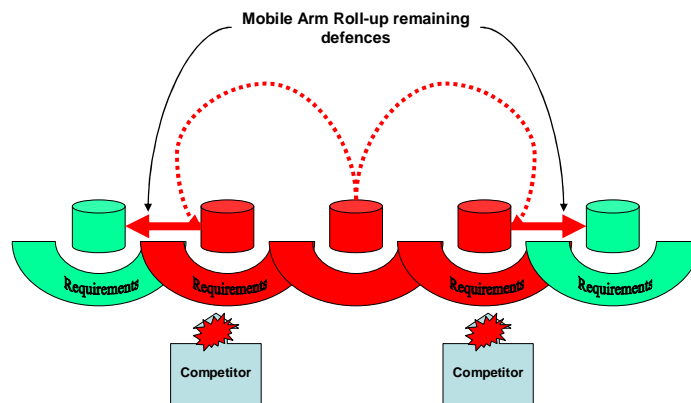
## Produce Flank

Having broken through, it is now possible to use the space created to produce flanks from within the defences.

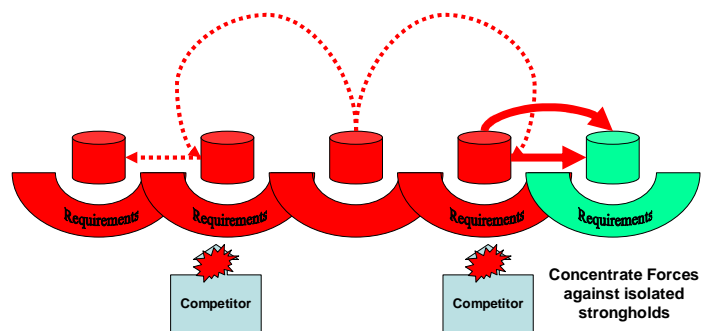


### Roll up Defensive Positions from Unexpected direction

Once one part of the Linear Defence is overrun unexpectedly, it will lead to other parts of the Linear Defence becoming weakened, and as they fall will negate the efforts of your competitors. This will be multiplied as your success increases due to the collapse of the “will to fight” in the prospects.



Once the rollup is achieved, it is then a matter of mopping up any lingering hostile departments at leisure until all resistance is overrun.



## **The Other Type of Engagement: How to win a Siege**

The vendor must look for small openings to exploit, must fight a war of attrition, blocking all routes for opposing forces to enter the account, and must try to wear down the prospects until an attack may be possible. It may require a small initial break-in by a minor force, but if this can hold its ground then there is a chance for a much bigger force to enter. Head on assaults are unlikely to gain any headway because of the inability to come to grips with the opposition, who is ensconced behind the walls of his lack of ability to buy. However there is ultimately no such thing as an impenetrable fortress.

If the account is garrisoned by the competition, they will move their forces to defend against the vendor's attempts to take the account by storm, they will counter mine the vendor's attempts to undermine the walls of the account with marketing activities, and continually look to open up access to their own supplies (marketing activities) to the account. In short the competition's account management activities will form the defence; it is this that must be broken down. The degree to which the prospects will actually defend will vary considerably, and they may take no aggressive action if they see no overt action from the besiegers, after all their sales force will be off looking for accounts with a willingness to buy, and will probably leave the defence of the existing accounts to garrison forces of technical staff, if any garrison is there at all. It is a fact that most companies give very few incentives to any of their staff to defend an account, incentives go to winning new business, whereas more predatory companies with competitive offerings often have the flexibility in their pay and discount structures to make an attempt on a hostile account worthwhile to their sales force.

Sieges succeed because of one of four reasons:

1. The besiegers starve the prospects out.
2. The besiegers storm the walls and overrun the prospects.
3. The besiegers use a technology that negates the defences.
4. Someone lets the besiegers in.

It must be remembered that a totally "impregnable fortress", in both military and business terms does not exist.

### **The besiegers starve the prospects out.**

This is the standard form of account management and may eventually work. Constant meetings, unsolicited proposals, fishing for an opening, the account looking for reasons not to spend money, the besiegers hurling ideas and products at the defences, the account taking the ideas and trying ways to achieve the same result using internal resources (repairing the walls).

Eventually either sales management tire of paying a salesman to sit outside the city walls without reducing the defences, or the customer's will to resist is subdued by an original product idea. Either way this is only for vendors with a lot of time on their hands.

### **The besiegers storm the walls and overrun the prospects**

In military and business terms this is very rare, usually involving huge resources from the vendors, and is unlikely to provide glittering prizes in themselves as budgets are not prepared or you wouldn't be in a siege situation in the first place.

Surprisingly this is what is usually asked of a salesforce. Not surprisingly it rarely goes to plan, and goes a long way to explaining why sales forecasts are usually completely inaccurate, the gap between theory and practice being a large one in both battle and business.

### **The besiegers use a technology that negates the defences**

In Business sudden innovations in "must have" technologies may temporarily sweep a market, but having peaked, and with the adoption of innovations by the competition breaking the initial technology monopoly, and Customers improving their defences (seeing through the marketing hype) markets soon settle down to long sieges again. It may be that you have a "killer" product that the customer cannot fail to need, want, and have the budget for, and therefore their defences will tumble before your "siege train" in which case you don't need this white paper.

### **Someone lets the besiegers in**

By far the best option in terms of time, resources, and efficiency is get someone to open a gate and let you in. In business terms it may be that an incumbent competitor decides that it costs them more to support the account than it is worth, they remove or weaken their garrison, causing discontent with the customer, who turns to you as an alternative, or it may happen because a customer manager sees an opportunity for professional advantage by using your solution, and brings you in to support their personal agenda.

## Summary: What to do

### Summary of Rules

- 1. Identify Pattern of current Campaign:**
  - a. Linear Engagement
  - b. Area Engagement
  - c. Siege Engagement
  
- 2. Assess your forces' for suitability to Campaign.**
  - a. Linear Campaign, Defensive Arm must be predominant.
  - b. Area Campaign, Mobile Arm must be predominant.
  - c. Siege Campaign, Siege Arm must be predominant.
  
- 3. Turn Linear Engagement into an Area Engagement:**
  - a. Find and turn a flank.
  - b. Create a flank via a Break-in and Break-through.
  - c. Administer (Manage) Mobile Arm to the point of decisive victory.
  
- 4. If Siege Engagement; either bypass and seek a more lucrative campaign, or attempt the following order of engagement:**
  - a. Subvert strongpoint from within.
  - b. Use approach that negates the defences.
  - c. If you have adequate numbers storm the walls.
  - d. If you have inadequate numbers, cover main information accesses and counter any attempts to supply the account with information from competition, until account surrenders.