# A Note from Jack…

As a salesguy and then as a manager and then president of various companies, I always required detailed sales plans for the entire year with particular emphasis on quarterly plans.   That process of kicking off the year with an annual sales plan and then asking the regional managers to break that down into quarters for their own territories or named accounts worked very well for a long time…until it didn't.  I'm still a big proponent of putting the managers and their SEs through the process, but I've also realized that the process required a ton of work  and it became rather static in its reporting and not a resource.

We are a huge fan of Hubspot, and a couple of their sales execs who are my alums from my Tufts Science of Sales course, work there and introduced me to the concept of Sales Playbooks and we now use them with all our sales-related assignments.

John Routhier is one of the best sales managers I have ever met.  A Tufts alum, I met him through one of our courses and have had a 20-year relationship with him as a Tufts lecturer, as a partner at Derby Management, as an advisor to many of our customers and now as an Operating Partner at the PE firm, SNH.  This deck is the creation of John, and I think that it is exceptional in terms of what's happening in the very best operating companies in terms of sales productivity.

I have used most of John's content with some edits.

# Modern Consultative Selling Playbook

## *For B2B Enterprise Sales Teams*

Sell Smarter • Serve Better • Win Together.

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# Executive Summary

**Purpose**
- To help sales organizations modernize enterprise selling — blending **consultative depth, process discipline, and buyer empathy** to guide complex buying groups confidently from first meeting to expansion.
- This playbook provides a **complete yet adaptable framework** for structuring, executing, and scaling complex B2B sales motions — flexible enough to fit different maturity levels and market segments.

**Framework Overview**
- **Seven-Stage Enterprise Sales Process** – from research through client handoff.
- **Consultative Selling Foundation** – empathy, insight, and value alignment.
- **Sales Performance System** – metrics, cadence, and coaching rhythm.
- **Leadership Playbook** – enablement, forecasting, and accountability frameworks.

**Key Outcomes**
- **Stronger deal execution** through consistent, insight-led engagement.
- **Shorter cycles & higher win rates** via better qualification and alignment.
- **Improved retention & expansion** through seamless CS handoff.
- **Greater leadership visibility** into pipeline health and forecasting accuracy.

**Adoption Guidance**
- This is an **all-encompassing enterprise framework**, designed as the gold standard for consultative selling.
  - **Adopt and scale** based on organizational readiness, team size, and account complexity.
  - **Mid-market or velocity teams:** streamline stages, automate key steps.
  - **Enterprise teams:** apply full framework end-to-end for maximum impact.

# Why Consultative Selling Matters Today

- **The Enterprise Reality:**
  - Buyers are more informed than ever and expect tailored expertise.
  - Committees — not individuals — make complex purchasing decisions.
  - The difference between average and elite sellers is *insight, not access.*

- **The Shift in Focus:**
  - From **pitching** to **problem-solving.**
  - From **talking** to **teaching.**
  - From **closing deals** to **building trust.**

- **Bottom Line:**
  - Modern consultative sellers create clarity in complexity — helping customers make confident, high-impact decisions.

# The Modern Buyer Shift

| Then | Now |
| --- | --- |
| Product-driven conversations | Problem-driven, insight-led dialogue |
| Linear decision process | Collaborative, cross-functional journey |
| Seller-controlled flow | Buyer-led exploration with guidance |
| Value in features | Value in business outcomes |
| One-time win | Ongoing relationship & partnership |

**Implications for Sellers:**

- Lead with **insight and empathy.**
- Engage **multiple stakeholders** early and often.
- Deliver **quantifiable business outcomes**, not promises.
- Use **AI and data** to inform, not replace, human connection.

# Stage 1

# Research and Preparation

## Stage Overview: The Foundation of Every Deal

**Purpose:**
- Understand your target account, their market, and the people making the decision before first outreach.

**Why It Matters:**
- Preparation signals respect and professionalism.
- It separates sellers who talk from sellers who teach.
- Enterprise buyers expect you to know their business, not just your product.

**Key Objectives:**
- Build a clear view of the *organization*, *industry pressures*, and *stakeholder dynamics.*
- Identify hypotheses of where your solution creates measurable value.
- Enter conversations ready to discuss *their world*, not yours.

*"Preparation doesn't slow you down—it lets you start ahead."*

# What to Research

1. **Company Context**
   - Business model, strategic priorities, growth initiatives.
   - Organizational structure and geographic footprint.
   - Financial performance, major customers, market position.
2. **Industry Landscape**
   - Trends, regulations, and economic pressures shaping their sector.
   - Competitor moves and market disruptors.
   - External events that may create urgency or risk.
3. **People & Politics**
   - Identify decision-makers, influencers, and blockers.
   - Research backgrounds, career paths, and shared connections.
   - Understand who owns budget, who owns execution, and who owns risk.
4. **Technology & Process Insight**
   - Current tech stack and systems.
   - Gaps, inefficiencies, or integration challenges your solution can address.

# How to Research Effectively

1. **Company Context**
   - Start with investor materials: annual reports, earnings calls, press releases → highlight strategic initiatives.
   - Use Google Alerts or Talkwalker: stay ahead of leadership changes, acquisitions, or product launches.
   - Check job postings: hiring patterns reveal growth areas or new internal focus.
2. **Industry Landscape**
   - Set up keyword alerts: track industry news, regulatory updates, and competitor moves.
   - Leverage analyst reports (Gartner, IDC, Forrester): extract trends, forecasts, and challenges relevant to your target accounts.
   - Follow trade publications and association newsletters for emerging sector pain points.
3. **People & Power Dynamics**
   - LinkedIn: analyze roles, tenure, and past company experience to understand influence and bias.
   - Connections & mutual contacts: ask for soft introductions or inside perspective.
   - Social activity: review posts or interviews to learn their tone, focus, and communication style.
4. **Technology & Process Insight**
   - BuiltWith, HG Insights, or Wappalyzer: uncover existing tech stack.
   - Customer case studies or integration pages: identify systems they value most.
   - Job descriptions in IT or Ops: reveal pain points ("experience with outdated ERP," "migration projects," etc.).
5. **Competitor & Positioning Checks**
   - Compare messaging: what competitors emphasize in that vertical.

# Translating Research into Strategy

1. **Form a Value Hypothesis**
   - Synthesize your research into a clear working hypothesis:
     *"Because [company] is focused on [initiative], they're likely struggling with [pain]. Our solution could help by [specific value]."*
   - Create 2–3 hypotheses if multiple priorities exist — you'll validate them in discovery.
   - Keep them business-outcome oriented (speed, risk, cost, compliance, scalability).

2. **Identify Strategic Entry Points**
   - Use your insights to find the *best way in*:
     - Who owns the problem or KPI your solution impacts most?
     - Which departments are showing visible momentum or frustration?
     - What event or shift creates a natural reason to reach out (leadership change, funding, product launch, compliance deadline)?
   - Craft your outreach narrative around those trigger points.

3. **Build a Stakeholder Influence Map**
   - From your research, outline key players:
     - **Economic Buyer:** Controls budget.
     - **Technical Evaluator:** Validates feasibility.
     - **Operational User:** Feels the day-to-day impact.
     - **Champion:** Advocates internally.
     - **Blocker:** May resist or prefer current vendor.
   - Note each stakeholder's goals, motivations, and level of influence.
   - Identify alignment and potential friction points across the group.

# Translating Research into Strategy (continued)

| Business Driver | Value Message | Proof Point |
|---|---|---|
| Efficiency | Reduce time to market by 30% | Casy Study: (Client XYZ) |
| Compliance | Decrease audit risk by 10% | Analyst report excerpt |
| Growth | Scale new market faster by 25% | Integration success example |

4. **Align Value Messaging to Business Drivers**

• Translate your findings into tailored value themes (examples):

• Prepare concise proof points and visuals that speak their language.

5. **Prioritize & Sequence Your Approach**

– Focus first on **high-influence + high-pain** stakeholders.

– Plan a **multi-threaded engagement path:** initial champion → technical evaluator → executive sponsor.

– Sequence outreach to build momentum and credibility, not pressure.

6. **Capture in an Account Strategy Document**

– Summarize in a short, actionable plan (1–2 pages):

• Account objectives and priorities

• Hypotheses of value

• Stakeholder map

• Engagement plan and next steps

– Share internally with marketing, success, and leadership for alignment.

# Best Practices & Common Pitfalls

**Best Practices**

✅ **Start broad, then zoom in.** Begin with market and company research before diving into individual personas.

✅ **Use multiple sources.** Verify facts across financial reports, press releases, LinkedIn, and analyst commentary.

✅ **Turn data into insight.** Always ask "So what?" after every data point — what does it mean for their business?

✅ **Summarize findings visually.** Create a one-page prep brief for quick internal alignment.

✅ **Refresh often.** Markets and org charts change — update before every major meeting.

**Common Pitfalls**

🚫 **Mistaking information for insight.** Knowing facts isn't the same as knowing relevance.

🚫 **Over-researching without acting.** Don't let perfection delay outreach.

🚫 **Ignoring the people dimension.** Company data is useless without understanding motives and influence.

🚫 **Using boilerplate language.** Generic notes ("They want to grow") don't drive strategy.

🚫 **Failing to share insights internally.** Keep your team informed — silos kill consistency.

1. **Data Intelligence & Research Platforms**
   - **ZoomInfo / Apollo / Lusha:** Enrich contact and company data with verified details.
   - **LinkedIn Sales Navigator:** Map relationships, uncover mutual connections, and track job changes.
   - **Crunchbase / Owler / Craft.co:** Identify funding events, growth trends, and competitive positioning.
   - **Google Alerts / Talkwalker:** Monitor breaking news, leadership changes, or M&A activity.

2. **Market & Industry Insights**
   - **Gartner / Forrester / IDC:** Extract market forecasts, benchmark data, and industry drivers.
   - **AI summarizers:** Use ChatGPT or similar to condense analyst reports into key trends and talking points.
   - **Social Listening:** Monitor industry conversations via X (Twitter), Reddit, or niche forums to surface sentiment and emerging issues.

**Supporting Resources & Tools**

3. **Buyer & Stakeholder Intelligence**
   - **AI Persona Builders:** Generate quick summaries of likely priorities, risks, and KPIs by role or function.
   - **Engagement History:** Use CRM and call intelligence (Gong, Chorus) to review prior interactions and key moments.
   - **Behavioral Data:** Track which content prospects engage with via email, website, or marketing automation tools (HubSpot, Marketo).

4. **Automation & AI Assist**
   - **AI Research Agents (ChatGPT / Claude):**
     - Summarize company updates from multiple sources.
     - Draft personalized talking points or opening lines.
     - Identify trigger events and potential outreach angles.
   - **CRM Enrichment Bots:** Auto-update contact records with latest activity, reducing manual admin.
   - **Intent Platforms (6sense / Demandbase):** Identify accounts actively researching your category.

5. **Templates & Frameworks**

   **Supporting Resources & Tools (continued)**
   - **Account Research Brief:** 1-page doc capturing company context, stakeholder map, and hypothesized value.
   - **Insight Log:** Central repository for research summaries and triggers.
   - **AI-Enhanced Pre-Call Brief Generator:** Automatically compiles relevant company, role, and recent news data.

# From Research to Account-Based Strategy

**Stage 1 Recap — Research & Preparation**

• **Focus:** Individual understanding

– Gather company, industry, and stakeholder data.

– Form value hypotheses and key questions.

– Prepare to enter with relevance and insight.

• **Outcome:** A clear "Account Research Brief" answering:

– Who are they?

– What's changing in their world?

– Where can we create measurable value?

**Stage 2 Preview — Account-Based Strategy**

• **Focus:** Team orchestration

– Use Stage 1 insights to design a coordinated, long-term plan.

– Align sales, marketing, and customer success around one narrative.

– Combine AI signal detection with human judgment to drive action.

• **Outcome:** A *Living Account Plan* that drives:

– Multi-stakeholder engagement

– Unified messaging and outreach

– Ongoing progress tracking and adaptation

|  | Stage 1: Research and Preparation | Stage 2: Account Based Strategy |
|---|---|---|
| Goal | Build knowledge & insight | Build alignment & execution plan |
| Owner | Individual seller | Cross-functional team |
| Timeframe | Pre-engagement (days/weeks) | Ongoing (quarterly/yearly) |
| Deliverable | Research brief & value hypothesis | Account plan and orchestration dashboard |
| AI Role | Information gathering & summaries | Signal tracking & execution insights |

# Stage 2

# Building an Account-Based Strategy

# Stage Overview: Why Account-Based Strategy Matters

**Purpose:**

- Create a focused, insight-driven plan aligning sales, marketing, and success to win and grow high-value accounts.

**Why It Matters:**

- Complex buying groups need coordination, not cold outreach.
- ABS ensures relevance, focus, and consistency.
- Converts insights into clear plays and measurable progress.

**Objectives:**

- Target the right accounts.
- Personalize by role and initiative.
- Synchronize AI intelligence with human expertise.

*"Account-based strategy replaces randomness with relevance."*

1. **Prioritize Strategically**
   - Focus on ICP fit + visible buying intent.
   - Use **AI intent data** (6sense, Demandbase) to spot active researchers.
2. **Segment Intelligently**

| Tier | Definition | Coverage Approach |
|---|---|---|
| Tier 1 – Strategic | High revenue potential, high complexity | 1:1 ABS plays (dedicated sales, marketing, and exec sponsorship) |
| Tier 2 – Growth | Moderate complexity, active engagement | 1:few targeted campaigns and shared coverage |
| Tier 3 – Watchlist | Emerging fit or future opportunity | Automated nurture with AI intent monitoring |

3. **Assign Ownership:** Account-Based Strategy is a team sport. Every role contributes to orchestration.

| Role | Primary Focus | Key Responsibility |
|---|---|---|
| Account Executive (AE) | Strategist & quarterback | Owns the account plan, defines plays, aligns stakeholders, drives deal progression. |
| ales Development Rep (SDR/BDR) | Outreach & entry point | Executes personalized prospecting and secures first meetings. |
| Marketing Partner | Awareness & engagement air cover | Runs targeted campaigns, content, and events to warm and influence the account. |
| Customer Success (CS) | Proof & advocacy liaison | Provides case studies, references, and expansion insights. |
| Sales Eng/Solutions Consultant | Technical validation | Demonstrates product value and ensures solution alignment. |

# Develop the Account Game Plan

1. **Define the Account Objective**
   – Clarify the business outcome you'll help them achieve.
   – Link to measurable KPIs (ROI, efficiency, risk, speed).
2. **Identify Strategic (Win) Themes**
   – Build narrative pillars from Stage 1 research:
   *Digital Transformation | Operational Resilience | Customer Experience.*
3. **Build a Stakeholder Map**
   – List economic, technical, operational, user, and champion roles.
   – Add influence & relationship scores (using CRM or AI tools).
4. **Craft Value Narratives**
   – Examples:

| Persona | Core Need | Tailored Message |
|---------|-----------|------------------|
| Executive | ROI + growth | "Enable X % revenue gain through Y." |
| Technical | Integration + security | "Seamlessly fits with existing stack." |
| User | Efficiency + ease | "Simplifies process by reducing steps." |

**Deliverable:** One-page *Account Game Plan* summarizing objectives, players, and plays.

# Orcestrating Engagement

1. **Personalize at Scale**
   – Use AI assistants for message drafts; refine with human context.
   – Tailor by industry + persona + trigger event.
   – Integrate video, voice, and micro-content to stand out.

2. **Collaborate Across Teams**
   – Marketing runs account-specific campaigns.
   – Executives sponsor top Tier 1 accounts.
   – CS shares ROI stories to build confidence.

3. **Engage Multi-Threaded**
   – Combine 1:1 executive touches with educational group sessions.
   – Track engagement signals via AI dashboards and adjust next steps.

*"Enterprise deals are won by teams who move in sync."*

1. **Define Metrics Early**
- Engagement by persona and channel.
- Opportunity progression and velocity.
- Win rate and expansion potential.
- AI-tracked intent and content consumption.

2. **Review Regularly**
- Bi-weekly team syncs to review signals and update plays.
- Use AI summaries to spot drop-offs or new interest spikes.

**Measure, Learn & Adapt**

3. **Share and Scale Learnings**
- Document winning tactics in shared workspace.
- Replicate patterns for similar accounts.

4. **Stay Agile**
- Update plans quarterly as business conditions change.
- Treat ABS as living strategy, not static document.

# Best Practices & Common Pitfalls

## Best Practices

- ✅ Align sales, marketing, and CS from the start.
- ✅ Let AI surface signals — use human judgment to interpret them.
- ✅ Refresh account hypotheses after each major conversation.
- ✅ Celebrate momentum milestones to maintain focus.
- ✅ Use a shared "Account Health Dashboard" to keep visibility high.

## Common Pitfalls

- 🚫 Confusing activity with progress.
- 🚫 Treating ABS as a marketing project instead of a revenue strategy.
- 🚫 Over-personalizing one contact and ignoring others.
- 🚫 Letting plans go stale after initial creation.
- 🚫 Failing to capture lessons learned for future plays.

*Human Strategy + AI Precision*

- **Strategic Resources. → Deliverables**
  - Account Strategy Template (1-page plan) → Account Game Plan
  - Stakeholder Mapping Worksheet with influence scores → Stakeholder Map
  - Persona Messaging Framework → Value Narrative Library
  - Quarterly Review Checklist → Engagement Tracker Dashboard

**Technology Stack**

| Category | Tools / Examples | Use Case |
|---|---|---|
| **CRM & Enablement** | Salesforce, HubSpot, Highspot | Centralize plans and content |
| **Data & Intent** | 6sense, Demandbase, Bombora | Detect buying signals early |
| **AI Assistants** | ChatGPT, Claude, Writer.ai | Summarize news, draft briefs, personalize messages |
| **Collaboration** | Asana, Monday, Notion | Coordinate cross-team execution |
| **Analytics** | Gong, Clari, Tableau | Measure engagement & forecast accuracy |

**Outcome:** A living strategy combining human insight and AI-driven precision for focused, high-impact execution.

# Stage 3

# Prospecting & Outreach

# Stage Overview: Turning Strategy into Momentum

**Purpose:**

- Convert your account strategy into meaningful conversations that open doors, earn trust, and create early value.

**Why It Matters:**

- Enterprise buyers expect relevance from the first touch.
- A well-researched, personalized outreach builds credibility fast.
- AI enables personalization at scale — but human context makes it real.

**Objectives:**

- Initiate contact through multi-channel, insight-driven engagement.
- Position yourself as a helpful advisor, not a vendor.
- Generate qualified meetings that advance the buying conversation.

*"Relevance is the new persistence."*

# Prospecting Framework: The Modern Outreach Mix

1. **Multi-Channel, Multi-Thread Approach**
   – Combine email, LinkedIn, phone, video, and events for layered engagement.
   – Touch multiple personas early (economic, technical, user).
2. **Intent-Led Prioritization**
   – Use AI platforms (6sense, Demandbase, Bombora) to spot accounts showing buying signals.
   – Time outreach to align with peaks in account intent data.
3. **Insight-Led Messaging**
   – Reference their initiatives or trigger events from research.
   – Keep messaging about *them*, not *you.*
   – Anchor on outcomes, not features.
4. **Cadence Structure (Example)**

| Day | Channel | Purpose |
| --- | --- | --- |
| Day 1 | Personalized email | Share relevant insight or stat |
| Day 3 | LinkedIn connect + note | Light, human introduction |
| Day 6 | Phone or video voicemail | Add tone + emotion |
| Day 10 | Share resource | Case study or industry report |
| Day 14 | Follow-up message | Reference prior outreach |

# Personalization at Scale

1. **Personalize by Context, Not Just Name**
   - Mention current priorities ("Saw your team's Q2 focus on automation").
   - Use AI to summarize news and tailor first lines.
   - Align value to **role**, **department**, and **pain point.**
2. **Human + AI Collaboration**

| AI Does | You Do |
|---|---|
| Summarizes company news & posts | Choose what's relevant |
| Drafts message variants | Add human tone & insight |
| Suggests cadence timing | Adjust based on intuition |

3. **Recommended Tools**
   - **ChatGPT / Claude / Writer.ai:** Draft messaging.
   - **Lavender / Regie / Copy.ai:** Optimize tone.
   - **Wistia / Loom:** Record short intro videos.

*"Automation should serve personalization — not replace it."*

# Messaging Framework: The Relevance Formula

1. **Open with Context**
   - "I saw your team expanding into new markets this quarter."
2. **Bridge with Insight**
   - "We've seen companies in your space accelerate results by simplifying [X process]."
3. **Anchor to Value**
   - "That helped similar organizations reduce onboarding time by 40%."
4. **End with Permission, Not Pressure**
   - "Would it make sense to share how they approached it?"

**Formula:  [Relevance Trigger] + [Insight] + [Value Hook] + [Collaborative CTA]**

# Persistence, Signals & When to Pivot

1. **Monitor Buying Signals**
   - **Hot:** Multiple engagements → call now.
   - **Warm:** Some activity → educate and stay visible.
   - **Cold:** No signal 30 days → pause or re-evaluate.
2. **Ask Before Adding Volume**
   - Is the message still relevant to their initiative?
   - Are you targeting the right personas?
   - What does intent data show?
3. **Pivot / Pause Framework**

| Stage | Signal | Action |
|---|---|---|
| 5–6 touches | No opens | Rewrite subject / intro |
| 8–10 touches | Opens but no replies | Switch persona or value focus |
| 12–15 touches | No signal 30+ days | Move to nurture |
| 90 days | New signal appears | Re-engage with fresh insight |

4. **Professional Persistence**
   - Enterprise deals average 6–8 meaningful touches.
   - Every follow-up must *teach* or *inform.*
   - Always close loops gracefully.

# Outbound Prospecting Best Practices & Common Pitfalls

**Common Outbound Pitfalls**

- ✅ Lead with insight — reference industry, role, or initiative.
- ✅ Be brief: 3–5 sentences max.
- ✅ Add value with every touch — stat, story, or resource.
- ✅ Use varied formats: voice, video, social.
- ✅ Target multiple personas — enterprise deals are team decisions.
- ✅ Use analytics and AI to track engagement, opens, and timing.

**Common Outbound Pitfalls**

- 🚫 Generic messaging or templates ("Hope you're well…").
- 🚫 Talking about product too early.
- 🚫 Focusing on one contact only.
- 🚫 Ignoring intent or timing signals.
- 🚫 Sending too many follow-ups without new insight.

*"Every touchpoint is a trust point — use it wisely."*

# Event & Conference Prospecting

1. **Pre-Event Preparation**
   – Identify attendees early using event apps, sponsor lists, or LinkedIn.
   – Segment targets by ICP and intent.
   – Use AI to summarize attendee backgrounds and company goals.
   – Reach out 1–2 weeks prior with value-based notes:
     *"I noticed you'll be at [Event]. We've helped [similar orgs] improve [X]. Would love 10 mins to connect."*

2. **During the Event**
   – Lead with curiosity, not a pitch.
   – Ask about their challenges, priorities, or upcoming projects.
   – Capture context: notes, quick CRM entries, or digital badge scans.
   – Share short, insight-driven materials (1-page benchmarks or case visuals).

3. **Capture Context**
   – Record *who*, *what topic*, and *follow-up intent.*
   – Tag contacts in CRM by event for post-show tracking.

# Post-Event Follow-Up Strategy

1. **Follow Up Fast (24–48 hrs.)**
   – Reference the event explicitly.
   – Mention your specific chat or session topic.
   – Add relevant insight or asset (panel summary, short video, case study).
2. **Segment & Prioritize**

| Category | Signal | Action |
|---|---|---|
| High Intent | Requested meeting/demo | Immediate AE follow-up |
| Warm | Expressed curiosity | 3-step nurture sequence |
| Networking | General interaction | LinkedIn connect + light nurture |

3. **Team Collaboration**
   – Combine booth, session, and informal contacts.
   – Debrief key insights and update CRM campaign tagging.
4. **Marketing Amplification**
   – Launch "Thanks for visiting" email series — focus on value, not sales.

*"Events are about relationships, not business cards."*

# RFP & Procurement Strategy (Part 1) | Getting on the List

1. **Understand the System**
   - Most enterprises use **vendor registration portals** (e.g., Ariba, Coupa, Jaggaer).
   - Registration ensures visibility for upcoming RFPs/RFIs.
2. **Getting Registered**
   - Identify procurement platform on company websites.
   - Prepare documentation: insurance, tax, compliance, references.
   - Create a 1-page *Vendor Capability Statement* — your value story.
   - Request sponsorship from champions or existing clients.
3. **Use Partnerships**
   - Current customers can often sponsor your inclusion.
   - Track status in CRM until registration is confirmed.
4. **AI Assist**
   - Use AI tools to draft bios, standard RFI answers, and compliance text.
   - Keep responses stored in your enablement library.

*"Proactive engagement gets you invited before competitors even know there's a deal."*

# RFP & Procurement Strategy (Part 2) | Educating & Influencing

1. **Build Relationships Early**
   - Connect with procurement *before* the RFP cycle.
   - Offer insights, benchmarks, and category intelligence.

2. **Educate & Differentiate**
   - Highlight risk reduction, compliance, and ROI improvements.
   - Use data and case studies — procurement loves quantifiable value.

3. **RFP Best Practices**
   - ✅ Reconfirm objectives before responding.
   - ✅ Customize — avoid boilerplate copy.
   - ✅ Add visuals and executive summary.
   - ✅ Use AI to proof and structure responses.
   - ✅ Follow up post-decision for feedback.

4. **Long-Term Play**
   - Host webinars or roundtables for procurement teams.
   - Offer thought leadership to shape future RFP criteria.

*"Educate procurement consistently — influence starts long before the bid."*

# Handling Inbound Leads

1. **Acknowledge Immediately (Automated)**
   - Send an auto-confirmation within minutes: *"Thanks for reaching out — a member of our team will connect shortly."*
   - This satisfies response-speed expectations while buying time to qualify properly.
   - Include value ("Here's a short guide while we review your request").

2. **Analyze Before Responding**
   - **Use AI enrichment** to review:
     - Job title, department, and company info (ZoomInfo, Apollo, LinkedIn).
     - Prior engagement with your brand (emails, events, web visits).
     - Account intent data (6sense, Demandbase): When did interest start? Which topics spiked?
     - Other contacts from the same company already in your CRM.
   - **Goal:** Understand *context* before human outreach.

3. **Identify the Lead Type**

| Type | Indicators | Approach |
|---|---|---|
| Champion | Deep questions, "My team" language | Build trust, ask for stakeholder map |
| Economic Buyer | Senior title, ROI focus | Lead with business impact |
| Stakeholder / Evaluator | "Comparing options" | Educate & differentiate |
| End User / Researcher | Tactical interest | Nurture with insights |
| Procurement | RFP or process focus | Confirm scope; involve AE early |

# Handling Inbound Leads (continued)

4. **Respond with Precision (Human Touch)**
   – Reference their exact inquiry: *"I saw you downloaded our compliance benchmark…"*
   – Acknowledge their role context and value: *"Many operations leaders use it to optimize XYZ."*
   – Suggest a next step that fits their persona and stage:
     *"Would it help to walk through how other firms have approached this?"*

5. **Qualify with Curiosity**
   – Ask questions that uncover motivation and stage:
     • "What prompted your interest right now?"
     • "Who else is involved in evaluating this?"
     • "What outcome are you hoping to achieve?"
     • "Speed wins the moment; context wins the relationship."

6. **Internal Follow-Up Process**
   – Tag lead type and account stage in CRM.
   – Route hot or qualified inbound directly to AE.
   – Add context and AI summary to opportunity notes.
   – Use automated nurture for low-intent or researcher-level leads.

# Inbound Follow-Up & Nurture Cadence

1. **Purpose:**
   - Guide the lead from initial inquiry to meaningful next step — meeting, qualification, or nurture track. Even high-intent inbound leads often need thoughtful follow-up to convert.

2. **Recommended Follow-Up Cadence**

| Stage | Timing | Action | Objective |
| --- | --- | --- | --- |
| Initial Response | Acknowledge within minutes; Respond the same business day | Personalized reply referencing their context | Establish credibility |
| Email or LinkedIn message | Day 2–3 | Share relevant insight or short success story | Add value |
| Phone / video voicemail | Day 5–7 | Humanize connection, offer short call | Drive conversion |
| Send resource or invite (case study, webinar) | Day 10–14 | Reinforce expertise | |
| Graceful close or shift to nurture | Day 15+ | Keep door open for future engagement | |

# Inbound Follow-Up & Nurture Cadence (continued)

1. **Nurture Path (if not ready yet)**
   - Add to **automated educational sequence** by role or interest.
   - Send periodic insights (quarterly updates, benchmarks, industry trends).
   - Use AI tools (HubSpot, Marketo, Outreach) to detect re-engagement or new activity.
   - "Nurture isn't passive — it's patient education."

2. **Track Engagement Metrics**
   - Response and meeting conversion rates
   - Content engagement (opens, clicks, downloads)
   - Intent score movement (if tracked via 6sense/Demandbase)
   - Time-to-conversion for inbound vs outbound

3. **Key Principle:**
   - Speed gets attention.
   - **Relevance + consistency build trust.**

*"Respond fast, follow up smart, and stay visible until timing aligns."*

# Best Practices & Common Pitfalls (Consolidated)

**Best Practices**

- ✅ Start from **insight**, not scripts — reference data, trends, or intent.
- ✅ Blend **outbound, inbound, event, and procurement** motions — each supports the other.
- ✅ Use **AI for intelligence and speed**, but human intuition for relevance.
- ✅ Always tag and log lead sources (inbound, event, referral, RFP) in CRM for attribution.
- ✅ Follow up with **purpose, not pressure** — add insight every time.
- ✅ Leverage **post-event and post-demo windows** — momentum fades fast.
- ✅ Keep procurement and champions informed — build relationships year-round, not just at buying time.
- •

**Common Pitfalls**

- 🚫 Over-automation: sending volume without context.
- 🚫 Ignoring lead type or engagement analytics before responding.
- 🚫 Treating conferences as lead lists, not relationship builders.
- 🚫 Waiting for RFPs instead of getting on procurement lists early.
- 🚫 Following up with no new value.
- 🚫 Failing to share insights internally — missed learning compounds.

# Supporting Resources & Tools

- **Enablement Resources**
  - **Messaging Framework Library:** Prebuilt sequences by persona, industry, and intent level.
  - **Outbound & Inbound Cadence Templates:** Tested structures for each motion.
  - **AI-Personalization Checklist:** Quick reference for balancing automation + empathy.
  - **Event & Conference Toolkit:** Outreach templates, post-event email series, CRM tagging guide.
  - **RFP / Procurement Playbook:** Vendor registration tracker, RFP response templates, compliance checklist.
  - **Prospecting ROI Dashboard:** Measure activity → engagement → meeting → opportunity conversion.

- **Technology Stack**

| Category | Tools / Examples | Purpose |
|---|---|---|
| Prospecting Automation | Outreach, Salesloft, Apollo | Execute cadences and sequences |
| Intent & Analytics | 6sense, Demandbase, Bombora | Detect buying signals and engagement spikes |
| AI Personalization | ChatGPT, Lavender, Regie | Draft, summarize, and optimize outreach |
| Video Engagement | Wistia, Loom, Vidyard | Add human touch and stand out |
| CRM & Enablement | Salesforce, HubSpot, Highspot | Centralize data, content, and contact logs |
| Performance Analytics | Gong, Clari, Tableau | Track effectiveness and forecast accuracy |

# Stage 4

# Discovery & Qualification

# Stage Overview | From Conversations to Clarity

**Purpose**

• Turn curiosity into understanding by uncovering customer needs, priorities, and success criteria.

**Why It Matters**

• Discovery defines whether there's real opportunity and how to create value.

• Enterprise deals succeed or fail based on the quality of discovery, not the demo.

• AI tools now enhance preparation, note-taking, and insight capture — but trust is built through human curiosity.

**Objectives**

• Conduct discovery that earns insight and credibility.

• Qualify opportunities based on business impact and fit.

• Map stakeholder dynamics and decision criteria.

• Align on next steps that progress the deal with purpose.

*"The best sellers don't just ask questions — they uncover value."*

# Discovery Mindset | Curiosity Over Qualification

1. **Listen to Learn, Not to Reply**
   - Treat discovery as co-creation, not interrogation.
   - Follow threads — don't rush your talk track.

2. **Balance Empathy + Business Insight**
   - Uncover both personal motivators and business objectives.
   - Focus on what success *means* to them, not just the pain they feel.

3. **Qualify Quietly**
   - Use frameworks to capture, not constrain, the conversation.
   - Let curiosity lead; validation comes later.

4. **AI Assist for Preparation**
   - Use AI to summarize company news, financials, or strategic goals.
   - Generate 3–5 tailored discovery questions per persona or industry.

*"Your goal isn't to sell in discovery — it's to earn the right to recommend."*

# Discovery Preparation Framework

1. **Pre-Call Research Checklist**
   - Company triggers (growth, funding, leadership, initiatives)
   - Industry trends or regulatory shifts
   - Competitors or alternatives in play
   - Stakeholder roles and previous interactions
   - Recent engagement signals (email opens, events, or content)

2. **AI Preparation Workflow**
   - Use ChatGPT or Writer.ai → "Summarize [Company]'s latest initiatives and risks."
   - Feed into CRM → auto-tag pain themes and strategic keywords.
   - Create a **Discovery Brief** for pre-call planning.

3. **Meeting Flow Template**

| Section | Purpose | Example |
| --- | --- | --- |
| Opening | Build rapport, set agenda | "Let's explore your goals before any solution talk." |
| Exploration | Understand challenges | "What's your current approach to [problem]?" |
| Vision | Quantify success | "If we fixed this, what would be different?" |
| Next Steps | Align expectations | "Would you be open to co-designing next steps with your team?" |

# Multi-Stakeholder Discovery

**1. Map the Buying Group**

– Identify the champion, economic buyer, influencers, and potential blockers.

– Use LinkedIn and CRM to visualize connections.

– Clarify decision process and approval flow.

| Persona | Focus | Example Questions |
|---|---|---|
| Executive | Strategic outcomes | "Which initiatives does this tie to?" |
| Operations | Process efficiency | "Where does friction show up most?" |
| IT / Security | Risk & integration | "What systems need to stay untouched?" |
| Finance / Procurement | ROI & compliance | "How do you measure cost efficiency?" |

**3. AI Assist**

– Generate stakeholder summaries and tone profiles from prior emails.

– Identify missing roles or new contacts from company org charts.

# Securing Multi-Stakeholder Buy-In

1. **Reframe the Ask**
   - "We've found projects move fastest when all key functions align early — even for a short 15-minute joint session."

2. **Enlist a Champion**
   - Ask: "Who else would have input or dependencies on this?"
   - Offer to coordinate invites and agenda for them.

3. **Use Value Framing**
   - "This ensures we tailor recommendations to each team's priorities and avoid rework later."

4. **Add Social Proof**
   - "When we did this with [Similar Company], including IT early cut implementation by 30%."

5. **AI Assist**
   - Use AI to map potential influencers based on titles in your CRM or LinkedIn.

*"Multi-stakeholder discovery isn't bureaucracy — it's insurance against wasted cycles."*

# Discovery Question Framework

**Core Pillars of Consultative Questioning**

1. **Context:** "How are you handling this today?"
2. **Impact:** "What's the consequence if it stays the same?"
3. **Priority:** "Why is this a focus now?"
4. **Process:** "How does your team decide on solutions like this?"
5. **Value:** "What would success look like six months out?"
6. **Next Step:** "What would you need to see to keep moving forward?"

*"The best discovery questions make them stop and think — not defend."*

# Qualification in Practice | From Insight to Validation

**Purpose** — Confirm the opportunity is real, winnable, and aligned to both sides.

| Step | What to Uncover | Example Question | Evidence of Fit |
|---|---|---|---|
| Metrics | Business impact & KPIs | "What KPIs are most affected?" | Quantified pain or gain |
| Economic Buyer | Budget owner & authority | "Who owns this investment?" | Named sponsor |
| Decision Criteria | Evaluation factors | "What will guide your decision?" | Clear success criteria |
| Decision Process | Buying steps | "What steps usually follow evaluation?" | Defined internal process |
| Identify Pain | Urgency / trigger | "What's driving this change now?" | Time-bound reason |
| Champion | Internal advocate | "Who else sees this as a priority?" | Active supporter |

**Signals of Fit:** Clear impact, executive attention, timeline, budget visibility.

**Red Flags:** No quantifiable value, no sponsor, vague timing, price-only focus.

# Making the Most of Your One Shot

1. **The Reality**
   - In complex B2B sales, you often get *one true discovery window* with key stakeholders.
     If they feel the meeting was generic, you're done.
     If they walk away thinking *"That was different — they understood us"*, you're in.
   - **Goal:** Deliver immediate relevance, credibility, and curiosity — fast enough to earn another conversation.
2. **Structure for Impactful First Meetings**

| Phase | Objective | How to Execute |
|---|---|---|
| Open with Authority | Establish credibility immediately | Reference a business trigger or observation: "I saw your new compliance initiative — that's driving major transformation across your space." |
| Earn the Right to Ask | Show you're here to solve, not sell | "We help leaders facing similar challenges. Mind if I ask a few questions about how you're approaching this internally?" |
| Uncover Context Quickly | Diagnose without interrogating | Use 2–3 thoughtful openers (Impact / Priority / Process) to surface what matters most. |
| Deliver Micro-Value | Prove expertise fast | Share a 30-second relevant data point or peer example — "In your industry, teams who automated [process] saw 40% reduction in time-to-hire." |
| Co-Create Insight | Shift from Q&A to collaboration | Use a shared doc or whiteboard to capture challenges and desired outcomes together. |
| Close with Momentum | End decisively | "Would it make sense to map what success would look like across your team and return with a plan next week?" |

# Making the Most of Your One Shot (continued)

**3.  Psychological Levers**

– **Preparation = Instant Credibility:** show knowledge of their world, not your product.

– **Insight = Authority:** share one idea they haven't heard.

– **Empathy = Safety:** validate their pressure or complexity.

– **Clarity = Momentum:** finish with next steps that feel obvious, not forced.

**4.  AI Assist**

- Before: Generate a 90-second briefing of company priorities + known stakeholders.
- During: Use AI note-takers (Gong, Otter, Fireflies) to track intent, objections, and priorities.
- After: Ask ChatGPT or CRM AI → "Summarize this meeting's pain points, drivers, and next actions in customer-centric language."

**5.  Key Takeaways**

✅  Make them feel *understood*, not *sold to*.

✅  Bring one powerful insight.

✅  Co-create, don't interrogate.

✅  Leave them thinking, "They just helped me think differently."

*"The best first meetings feel like strategy sessions — not sales calls."*

# Managing Curiosity: Turning Demos into Discovery Moments

1. **Context**
   - Prospect curiosity shows up in two ways:
     - **Path A:** They're intrigued after discovery and want to *see it*.
     - **Path B:** They *refuse discovery* until they see something first.
   - Both moments are opportunities to advance understanding — if handled strategically.
   - The key is to use the demo as a **discovery engine**, not a **product tour**.

2. **Path A: When Discovery Leads to a Demo**
   - Acknowledge their interest: "Great — let's visualize what that might look like."
   - Revisit their pain points before showing anything.
   - Demonstrate relevance: "You mentioned X — this is how others solved that."
   - Invite dialogue: "Would this fit your current workflow?"
   - End with alignment: "Which areas would you want us to explore deeper?"

3. **Path B: When They Want a Demo Before Discovery**
   - **Empathize:** "Absolutely — seeing it's the fastest way to align."
   - **Reframe:** "Can I ask what you're hoping to confirm so I can make this relevant?"
   - **Run a Hypothesis Demo:** "If your focus is [X], this is what that looks like."
   - **Ask reflective questions** as you show:
     - "How does this compare to your current process?"
     - "Who would handle this today on your team?"
   - **Transition back to discovery:** "Would it make sense to map this to your priorities in more detail?"

# Turning Demos into Discovery Moments

1. **The Mindset**
   - The best demos don't sell *software* — they sell *clarity.* They should reinforce:
     - • "We understand your world." | "We've solved this before." | "We're worth exploring further."
2. **Design for Relevance**
   - Confirm who's attending and what success looks like.
   - Build the demo around **3 business outcomes**, not product modules.
   - Use AI to tailor storylines for each persona (ROI, compliance, efficiency).
   - Bring a champion into prep to align messaging and flow.

| Principle | Description | Example |
|---|---|---|
| Relevance First | Open with their pain or KPI | "You said onboarding takes 12 days — here's how others got to 3." |
| Storytelling Flow | Problem → Impact → Solution → Value | "This step exists to eliminate the delay you mentioned." |
| Engage Every 5 Min | Ask, validate, check alignment | "Would this fit your team's workflow?" |
| Show Less, Context More | Minimize clicks, maximize meaning | "The impact isn't the screen — it's the time saved." |

3. **Follow-Up for Momentum**
- Send recap within 24 hours:
  - Recap of their goals and what they saw; include a 2-minute video or visual summary
  - Next step: "ROI session" or "Value Mapping Workshop"
- Track engagement (views, replays, internal shares).
- Reconnect with champion to validate resonance.

# Reigniting Stalled Opportunities

1. **Diagnose the Stall**
   – Did the business priority change?
   – Did we lose executive sponsorship?
   – Was value never quantified?
   – Is it stuck in procurement or conflicting projects?

2. **Reignite Momentum**
   – Send a new **insight or benchmark** tied to their goals.
   – Re-engage the **champion** privately: "What's changed since we last spoke?"
   – Offer a **brief exec check-in** or ROI validation call.
   – Share a relevant **customer story** to re-spark belief.
   – Watch **intent and engagement data** (6sense, Demandbase, Gong) for renewed signals.

3. **If Still Cold**
   – Move to **nurture track** with quarterly, insight-based touches.
   – Log learning in CRM for pipeline review.

*"Deals don't die — they drift. Bring them back with relevance."*

# Discovery Execution: Best Practices & Pitfalls

1. **Core Best Practices**
   - ✅ **Set Expectations Early** — confirm agenda and outcome at the start.
   - ✅ **Listen 80% / Talk 20%.** Let silence draw depth.
   - ✅ **Mirror & Validate** — "It sounds like X matters most, right?"
   - ✅ **Deliver Micro-Value** — short insight or story that reframes thinking.
   - ✅ **Recap in Writing within 24 Hours:**
   - • What they said
   - • What you heard
   - • Next steps agreed
   - ✅ **Collaborate Internally** — share discoveries with Marketing & CS.

2. **Use AI for Insight & Scale**
   - Record & transcribe (Gong, Fireflies, Otter).
   - Auto-summarize themes and objections into CRM.
   - Review top calls to spot patterns and coach the team.
   - "AI captures data — you capture context."

3. **Common Pitfalls**
   - 🚫 Treating discovery as a script.
   - 🚫 Jumping into product too soon.
   - 🚫 Missing the economic buyer.
   - 🚫 Failing to document insights.
   - 🚫 Ending without mutual next steps.

*"Bad discovery collects answers. Great discovery earns advocacy."*

# Supporting Resources & Tools

**Enablement Resources**

• Discovery Question Library (by persona / industry)

• Multi-Stakeholder Buy-In Playbook

• AI Prep & Call Brief Template

• Qualification Guide

• Discovery Recap Email Templates

• Deal Reactivation Playbook

**Technology Stack**

| Category | Tools / Examples | Purpose |
|---|---|---|
| AI Call Intelligence | Gong, Fireflies, Otter.ai | Record & summarize calls |
| Research & Intent | 6sense, Crunchbase, LinkedIn SN | Pre-call insight |
| CRM Enablement | Salesforce, HubSpot | Auto-populate qualification fields |
| Content Engagement | Highspot, Seismic, Wistia | Share recaps & track views |
| Collaboration | Slack, Notion, Confluence | Share findings internally |

**Outcome:** Discovery that's insight-driven, structured, and customer-centric.

# Stage 5

## Solution Alignment
## &
## Value Demonstration

## Stage Overview | From Insight to Impact

**Purpose**

• Translate discovery insights into tailored solutions that prove measurable business value.

**Why It Matters**

• Buyers don't buy *features* — they buy *outcomes.*

• Enterprise stakeholders expect a narrative that connects solution to strategy.

• Demos, proposals, and proof points are now *evidence* of understanding.

**Objectives**

• Design solutions mapped to strategic priorities.

• Quantify impact and ROI.

• Deliver value-based demonstrations.

• Build consensus across roles.

# The Solution Alignment Mindset

**1. Shift from Features to Fit**

- Start with their goals: "You said X and Y mattered — here's how this addresses them."

**2. Guide, Don't Dump**

- Each recommendation should simplify their path forward, not overwhelm it.

**3. Align Language to Stakeholder Level**

- Executives → outcomes and ROI
- Users → workflow and ease
- IT → security and integration

**4. AI Assist**

- Use AI to synthesize discovery notes into key pain ↔ solution maps and quantify potential impact automatically.

*"The best alignment conversations feel like joint design sessions."*

| Step | Focus | Example Questions |
|------|-------|-------------------|
| **1 – Reconfirm Objectives** | Anchor to what was learned in discovery | "Are reliability and speed still top priorities?" |
| **2 – Map Capabilities to Pain Points** | Connect features → outcomes | "Here's how we reduce time to hire time by X %." |
| **3 – Show Proof of Impact** | Use data, references, or pilots | "Customers like you achieved [metric]." |
| **4 – Co-Design Next Steps** | Get feedback & refine | "What would you need to validate this internally?" |

**Tools:**
- AI summary of discovery insights → solution map
- Case study templates → industry benchmarks
- Value calculator → ROI modeling

# Quantifying Value & ROI

**Purpose:** Turn qualitative need into quantified business impact.

1. **Identify the Value Drivers**

• Cost savings | Efficiency | Risk reduction | Revenue gain | Employee retention

2. **Create a Value Hypothesis**

• "Based on your [volumes/process], this could save ~ $X or Y hours per month."

3. **Validate Assumptions Collaboratively**

• Invite finance or ops to confirm inputs.

4. **Document the Business Case**

• Include ROI summary in proposal and demo follow-up.

**AI Assist:**
Use ChatGPT / Clari / Gong Insights to convert call data and benchmarks into ROI language.

*"If you can measure it, they can champion it."*

# Wide-Audience Meetings (WAM) | Preparation & Team Strategy

1. **Purpose of the WAM**
   - Consolidate multiple stakeholders around your proposed approach.
   - Validate alignment between business priorities, technical needs, and your solution.
   - Advance the deal from interest → executive validation.
   - "This isn't a presentation — it's a strategy session with a shared agenda."

2. **Pre-WAM Discovery Gaps**
   - **If you haven't done discovery with everyone:**
     - **Leverage known insights:** Summarize what you already know about the account's goals, pain, and current process.
     - **Use AI briefing tools** to pull data from CRM, transcripts, and public sources.
   - **Create "hypothesis statements":**
     - "We understand that [Department A] prioritizes speed, while [Department B] focuses on compliance."
     - Ask for validation during the session: "Does that resonate with your perspective?"
   - **Use introductions for micro-discovery:**
     - During intros, ask each participant:
       - "To make today most valuable, what's one or two things you'd like to take away from this session?"
     - Capture their answers in real time to guide emphasis.
   - **Build interactive moments** (polls, questions, live examples) to uncover unvoiced needs.
   - Capture new insights for follow-up.

*"If you can't know everything before, design the session to learn as you go."*

# Wide-Audience Meetings (WAM) | Preparation & Team Strategy (continued)

3. **Who Should Be in the Room (Our Side) -** Keep to 3–4 voices max

| Role | Primary Focus | Responsibility |
| --- | --- | --- |
| Account Executive (AE) | Lead storyteller | Orchestrates flow, ties everything back to customer goals |
| Solutions Consultant / Engineer | Technical credibility | Demos or validates how the solution works |
| Executive Sponsor | Business validation | Frames strategic partnership, connects to execs |
| Customer Success / Implementation Lead | Future confidence | Explains onboarding & adoption |
| Note Taker / Analyst | Capture & follow-up | Logs questions, insights, and next steps |

4. **Executive Sponsor Touch Points**

– **Before WAM:**

- Send short message or video to customer exec — "Looking forward to aligning on your priorities and how we can accelerate them."
- Join prep call to align tone and goals.

– **During WAM:**

- Open or close strategically; speak to shared vision, not details.

– **After WAM:**

- Send thank-you + high-level recap of alignment and next steps.

*"**Executive presence signals commitment more than slides ever can.**"*

# Wide-Audience Meetings (WAM) | Delivery & Positioning-1

1. **How Much to Talk About Us**
   - 1–2 slides max on company context: credibility, scale, relevant customers.
   - 80% of the meeting on *their* objectives, challenges, and future state.
   - Share relevant peer success stories — no "about us" monologue.
   - **Rule:** If it doesn't connect to *their goals*, it doesn't belong.

2. **Running the Session**
   - Start with *their* world — recap discovery insights, hypotheses, and priorities mentioned during intros.
   - Clarify the agenda and desired outcomes upfront.
   - Anchor every section in *value themes* (Efficiency • Risk • Experience).
   - Rotate presenters for rhythm and engagement.
   - Involve the audience:
     - "Does this reflect your team's reality?"
     - "Which of these challenges is most critical from your perspective?"
   - Watch for body language and tone — note who leans in, who stays silent.

# Wide-Audience Meetings (WAM) | Delivery & Positioning

1. **Post-WAM Follow-Up**

   – **Account Executive:** Send a personalized recap with agreed takeaways, actions, and any uncovered needs within 24 hours. Create a 3-5 min video of key takeaways.

   – **Executive Sponsor:** Send a thank-you note to customer execs reaffirming shared goals.

   – **Solutions Engineer / CS:** Follow up on specific technical or operational points raised.

   – **AI Assist:** Auto-summarize meeting notes to CRM (pain points, objections, decision drivers, new contacts).

# Building Consensus Across Stakeholders-1

1. **Map Influence & Gaps**
   – Use CRM and AI tools (Clari, 6sense, Gong) to identify engaged, silent, and new stakeholders.
   – Understand each role's driver:
     • Executive → Business outcomes
     • Program Manager → Execution success
     • IT / Tech Lead → Integration & scalability
     • Procurement → Cost & risk

2. **Equip Your Champion**
   – Send short, **role-specific video recaps** (1–2 minutes) summarizing what matters most to their priorities.
     • *Example:* "Here's a quick summary of how we address your compliance workflow."
   – Provide shareable **1-page summaries or slides** they can circulate internally.
   – Give them **talking points** to position your value confidently in their own words.

# Building Consensus Across Stakeholders-2

**3. Maintain Executive Thread**

– Keep a parallel, **executive-to-executive communication line.**

– Have your internal executive sponsor send short notes or videos reinforcing partnership vision.

– Keep it concise, high-level, and progress-oriented — not tactical.

**4. Track Engagement**

– Use content platforms (Highspot, Seismic, Wistia) to monitor who views shared content and for how long.

– Use insights to identify new influencers or silent blockers.

– Summarize "consensus health" in CRM or forecast notes.

1. **Create Targeted Follow-Up Engagements:** After your WAM, plan **2–3 micro-engagements** with key stakeholders on their focus areas.

| Stakeholder | Engagement Type | Purpose |
|---|---|---|
| Program Manager | Implementation Readiness Call | Validate rollout assumptions |
| Technical Lead | Integration Session | Address architecture & security |
| Finance / Procurement | ROI Workshop | Quantify and defend value |
| End-User Manager | Workflow Optimization Demo | Reinforce ease of use and adoption |

## Expanding Engagement & Reinforcement

Tips!
– Keep sessions 20–30 minutes max.
– Make them collaborative and forward-looking.
– Bring the relevant SME from your team

# Expanding Engagement & Reinforcement (continued)

**2. Reinforce Concepts Through Media**

– Use **short, personalized video recaps** to reinforce key messages or clarify complex ideas.

- Example: "2-minute walkthrough: how the automation flow you saw fits into onboarding."

– Post these to shared hubs or email threads for easy access and sharing.

**3. Measure & Adjust**

– Monitor who engages most with content or follow-ups — they often become hidden influencers.

– Track attendance and feedback from micro-sessions to identify where alignment is strongest or weakest.

– Use AI to summarize patterns across stakeholders ("Top 3 priorities driving this account's momentum").

**Key Takeaways**

- ✅ Don't stop after the WAM — deepen engagement by function.
- ✅ Use short, purposeful sessions to personalize relevance.
- ✅ Use video and follow-ups to reinforce learning and value.
- ✅ Consensus grows through tailored experiences, not volume of meetings.

*"Every targeted follow-up transforms interest into advocacy."*

# Best Practices & Common Pitfalls

**Best Practices**

✅ Start every presentation or demo with **their business context**.

✅ Quantify impact in **their metrics and language**.

✅ Follow up with **multi-stakeholder recaps**, tailored by role.

✅ Use **AI insights** to personalize messaging at scale.

✅ End every interaction with a **mutually confirmed next step**.

**Common Pitfalls**

🚫 Overloading sessions with features or slides.

🚫 Talking about *you* more than *them.*

🚫 Leaving the champion without simple, reusable stories.

🚫 Ignoring quiet stakeholders who influence later.

🚫 Waiting too long to quantify value.

# Supporting Resources & Tools

**Enablement Resources**
- Value Hypothesis Builder Template
- ROI Calculator Workbook
- Executive Summary & Recap Templates
- Demo / WAM Planning Checklist (by persona)
- Consensus Mapping Guide

**Technology Stack**

| Category | Tools / Examples | Purpose |
|---|---|---|
| ROI & Value Analysis | Clari Value, HubSpot ROI Tool | Quantify impact & forecast ROI |
| Demo Delivery & Tracking | Wistia, Loom, Consensus | Record and measure engagement |
| Presentation & Design | Pitch.com, Beautiful.ai | Visual storytelling |
| Collaboration & Enablement | Highspot, Seismic | Share materials & track stakeholder activity |

# Stage 6

# Negotiation & Close

# Stage Overview | From Alignment to Commitment

**Purpose**
- Convert value alignment into contractual agreement by managing pricing, terms, and internal alignment with precision and transparency.

**Why It Matters**
- Enterprise negotiations aren't about price — they're about *risk, confidence, and perception of fairness.*
- Strong negotiation protects both margin and relationship.
- Consistency between value story and pricing rationale builds long-term trust.

**Objectives**
- Manage multi-stakeholder negotiation cycles effectively.
- Defend value, not discount it.
- Navigate procurement and legal without losing momentum.
- Close strong, while setting up post-sale success.

*"Negotiation isn't the end of selling — it's the final proof of trust."*

# Negotiation Mindset

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**You don't negotiate the price of value — you negotiate the path to partnership**

1. **Focus on Partnership, Not Transaction**
   – Anchor every discussion in shared outcomes: "Our mutual goal is successful implementation and ROI, not just agreement on a number."

2. **Stay Anchored to Value**
   – Price = reflection of business impact, not market rate.
   – Use the ROI model built in Stage 5 as your anchor.

3. **Confidence = Credibility**
   – Discounting too early signals doubt. Confidence signals alignment.

4. **Detach from Emotion**
   – Buyers push to test conviction. Stay calm, focused, and data-driven.

5. **AI Assist**
   – Use AI (e.g., Clari, Gong) to detect tone shifts, objection trends, and pricing sensitivity across calls.

1. **Prepare Early**
   - Identify procurement and legal contacts before pricing discussions.
   - Understand their criteria: cost control, risk mitigation, contract consistency.
   - Align with your own legal & finance team on flexibility zones.
2. **Build Executive Air Cover**
   - Keep your sponsor or executive engaged — they can override inertia or bottlenecks.
3. **Expect the "Procurement Script"**
   - Common tactics and how to respond:

| Tactic | Intent | Your Response |
|---|---|---|
| "You're too expensive." | Test confidence | "Our ROI model shows we return X in 6 months." |
| "We need another discount." | Probe flexibility | "We can look at cutting scope or phased implementation if that helps with budget." |
| "We're reviewing competitors." | Buy time | "We're confident in the unique fit we've built around your priorities." |

4. **Use Data, Not Emotion**
   - Anchor to ROI, customer outcomes, and total cost of ownership.

*"Procurement respects preparation — not panic."*

# Defending Value & Handling Discount Pressure

1. **Reframe the Ask**
   – If they ask for discounts, explore what's behind it:
     • "Is this driven by budget cycles or perceived risk?"
     • "Would it help if we adjusted timing or phasing instead of price?"

2. **Use Non-Monetary Levers**
   – Add value instead of removing price:
     • Additional training
     • Faster onboarding
     • Extended support hours
     • Executive check-ins

3. **Offer Options, Not Concessions**
   – Tiered pricing or milestone-based deployment maintains partnership tone.

4. **Maintain Internal Alignment**
   – Never negotiate alone — involve sales leadership for approval and consistency.

*"The best negotiators don't cave — they reframe."*

# Maintaining Momentum & Executive Alignment

1. **Maintain Narrative Consistency**
   – All communication (emails, recaps, contracts) should reinforce: *value → outcomes → partnership.*

2. **Executive Engagement**
   – Your internal exec sponsor should stay visible until signature.
   – Customer executives appreciate concise progress summaries and reaffirmed ROI.

3. **AI & Analytics**
   – Use Clari / Gong to track deal velocity and silence patterns.
   – Flag accounts with dropped communication for leadership support.

*"Momentum isn't luck — it's managed."*

# Best Practices & Common Pitfalls

**Best Practices**
- ✅ Anchor pricing in ROI.
- ✅ Engage procurement early.
- ✅ Negotiate collaboratively, not defensively.
- ✅ Document every term clearly.
- ✅ Use internal escalation sparingly and strategically.
- ✅ End each negotiation phase with written recap.

**Common Pitfalls**
- 🚫 Starting price discussions before confirming value.
- 🚫 Conceding discounts without clarity.
- 🚫 Losing sponsor contact during procurement.
- 🚫 Allowing silence post-proposal.

*"You don't lose deals in negotiation — you lose them by losing conviction."*

# Supporting Resources & Tools

**Enablement Resources**
- Value Defense Guide
- ROI Calculator (ready-to-share version)
- Negotiation Scenario Playbook
- Procurement Objection Handling Matrix
- Legal & Pricing Approval Checklist

**Technology Stack**

| Category | Tools / Examples | Purpose |
|---|---|---|
| Deal Forecasting | Clari, HubSpot AI | Track velocity & stall points |
| ROI / Business Case | Clari Value, HubSpot ROI | Quantify and anchor negotiation |
| Document Automation | PandaDoc, DocuSign | Simplify close process |
| Call Intelligence | Gong, Fireflies | Surface objection & tone patterns |

**Outcome:** Controlled, confident, and value-based negotiation cycles.

# Stage 7

# Sales Hand off to Implementation or Client Success

# Stage Overview | From Close to Delivery

**Purpose**

– Ensure a seamless transition from sales to implementation / client success — so the customer immediately feels confidence, clarity, and continuity.

**Why It Matters**

– A poor handoff erodes the trust you spent months building.
– A structured transition accelerates time-to-value and time-to-revenue/renewals.
– Internal alignment between Sales, CS, and Implementation defines long-term partnership quality.

**Objectives**

– Conduct structured internal and external handoff meetings.
– Transfer context, success criteria, and commitments accurately.
– Maintain executive and champion engagement.
– Set up CS for proactive success management.

*"Customers shouldn't feel like they're starting over when they just started winning."*

# Internal Handoff Framework (Sales → CS / Implementation)

| Step | Focus | What to Transfer |
|---|---|---|
| 1. Internal Sync | AE → CS / Implementation | Account background, stakeholders, goals, risk flags, success metrics, commitments during the sales process |
| 2. Value Recap | Confirm outcomes sold | ROI drivers, quantified impact, business case summary |
| 3. Technical Context | Ensure readiness | Integrations, data sources, IT constraints |
| 4. Contract Details | Clarify deliverables | Scope, SLAs, pricing tiers, renewal terms |
| 5. Strategic Notes | Highlight people & politics | Champions, skeptics, executive sponsors |

**Tools:** CRM handoff templates, AI generated summary from sales notes

# External Kickoff & Introduction

1. **The Joint Kickoff Call**
   - **Purpose:** Align on goals, roles, implementation framework, and timeline.
   - **Attendees:** AE, CS / Implementation lead, Exec sponsor (optional, depending on the deal size/complexity), key client stakeholders.
   - **Agenda:**
     - Celebrate partnership
     - Reconfirm business objectives
     - Outline implementation plan and major milestones and dependencies
     - Define success metrics & next steps

2. **The Introduction**
   - AE personally conducts introductions, and hands off to CS/Implementation lead to walk through the rest of the agenda.
     - CS/Implementation taking the lead creates credibility and establishes trust
   - AE stays on the kickoff call to bridge trust and credibility

3. **Visual Kickoff Pack**
   - Follow your implementation framework but at the very least include summary of goals, value outcomes, timeline, and key contacts.

*"Your goal: zero daylight between what was sold and what's delivered."*

# Implementation Best Practices

1. **Universal Milestones**
   – Regardless of industry or solution complexity, most successful implementations include:
   – **Kickoff Meeting:** Alignment on goals, scope, and success criteria.
   – **Requirements & Design Phase:** Define workflows, integrations, and configurations.
   – **Configuration & Integration:** Build and validate technical setup, workflows, reporting, user configurations.
   – **Testing & UAT (User Acceptance Testing):** Validate performance, accuracy, and user workflows.
   – **Training:** Prepare users and administrators for adoption.
   – **Go-Live:** Execute launch, confirm readiness, and communicate success.

2. **Tracking Plan & Accountability**
   – **What to Track**
     • Project milestones and completion dates
     • Dependencies (internal + client-side)
     • Resource allocation and ownership
     • Risk register and mitigation plan
   – **Tools**
     • Smartsheet, Asana, Monday.com, Jira, CRM project boards
   – **Best Practice:** Maintain a **shared visibility dashboard** for both internal and client teams.

# Implementation Best Practices (continued)

## 3. Project Status Meetings

| Meeting Type | Frequency | Attendees | Purpose / Topics |
|---|---|---|---|
| **Project Status** | Weekly | CS / Implementation + Client PM / Tech Lead | Review tasks, risks, blockers, next steps |
| **Workstream / Technical Sync** | As needed | SMEs, IT, Engineers | Deep-dive on integrations & dependencies |
| **Steering Committee** | Bi-weekly / Monthly | Exec Sponsor + Client Exec | Review progress, risk, and business impact |

- **Agenda Guidance:**
  – Milestone progress
  – Risks / blockers
  – Action items & owners
  – Decisions needed

## 4. Keeping Executives Updated

  – Provide **bi-weekly written summaries**: milestones achieved, risks, upcoming decisions.
  – Highlight **early wins** that validate value.
  – Summarize impact in business terms (e.g., "on track to reduce processing time by X%").
  – Use dashboards or video recaps for visibility.

# Maintaining Engagement Post-Handoff

**1. Roles & Cadence During Implementation**

| Role | Cadence | Focus / Responsibility |
|---|---|---|
| **Account Executive (AE)** | Attend all **major milestone meetings** during implementation. | Provide business continuity, clarify original objectives, and reinforce value narrative. |
| **AE & Exec Sponsor** | **Attend Go-Live milestone meeting.** | Celebrate launch, confirm early results, and reaffirm partnership momentum. |
| **AE Post Go-Live** | Join **monthly status calls** for first 3 months, then move to **quarterly QBRs** (if appropriate). | Support CS, share insights, and identify upsell or advocacy signals. |
| **AE → Champion** | Conduct **informal 1-on-1 check-ins every 4–6 months.** | Maintain relationship pulse, surface evolving needs, an capture testimonials or lessons. |
| **Executive Sponsor** | Host **leadership-to-leadership check-ins monthly** for the first 6–12 months. | Strategic discussion on business outcomes, alignment, and relationship strength; act as escalation path. |
| **Exec Sponsor (Long-Term)** | After 6–12 months, maintain **semi-annual executive reviews.** | Keep relationship warm, discuss innovation, renewal trajectory, and strategic priorities. |

**2. Engagement Intent**

- **Implementation Phase:** Build trust and transparency.
- **Stabilization Phase (0–3 months):** Reinforce ROI proof points, remove friction, and document early wins.
- **Growth Phase (3–12 months):** Shift to strategy and expansion readiness.

# Communication & Documentation Checklist

**Pre-Kickoff Documentation**

- ✅ Discovery notes and objectives summary
- ✅ Solution configuration / scope document / commitments
- ✅ ROI model or business case
- ✅ Key contacts and stakeholder map
- ✅ Contract / SOW details

**Post-Kickoff Documentation (owner will become CS / Implementation lead)**

- ✅ Implementation milestones & owner
- ✅ Project plan with tasks, owners, dependencies
- ✅ Success metrics defined and agreed
- ✅ Risks logged with mitigation plan
- ✅ Communication cadence confirmed
- ✅ Follow your company's implementation framework document

**AI Assist:**

Use AI to compile a handoff brief: "Summarize deal context, stakeholders, success goals, and risks in one page."

# Best Practices & Common Pitfalls

**Best Practices**

✅ Stay engaged through first 60 days post-close.

✅ Make joint kickoff a celebration *and* alignment meeting.

✅ Confirm success metrics before implementation begins.

✅ Ensure CS/Implementation lead feels ownership, not burden.

✅ Keep exec-to-exec connection alive.

**Common Pitfalls**

🚫 Treating handoff as a calendar invite.

🚫 Transferring only data, not context.

🚫 Leaving open promises undocumented.

🚫 Letting momentum fade after contract signing.

# Supporting Resources & Tools

**Enablement Resources**

– Sales → CS Handoff Template

– Internal Alignment Checklist

– Customer Kickoff Deck

– 30-60-90 Day Success Plan Template

– Implementation Risk Tracker

**Technology Stack**

| Category | Tools / Examples | Purpose |
|---|---|---|
| CRM & Handoff Docs | HubSpot, Salesforce | Centralize context |
| Project Mgmt | Smartsheets, Asana, Monday, Notion | Track implementation milestones |
| Communication | Slack Connect, Teams | Maintain joint collaboration |
| CS Platforms | Gainsight, Catalyst | Manage adoption & health |
| AI Summaries | Gong, Fireflies | Auto-create transition briefs |

# Sales Performance Excellence

# Managing a Book of Business

# Section Overview - The Operating System of Sales Performance

**Purpose**

- Build a rhythm that enables every seller to manage their book of business like a business: focused, intentional, and predictable.

**Four Pillars of Sales Performance**

1. **Account Strategy & Focus** – Plan with precision, prioritize intelligently.
2. **Relationship Depth & Coverage** – Strengthen multi-threaded engagement.
3. **Account Progress & Momentum** – Advance aligned opportunities, not just stages.
4. **Business Outcomes & Predictability** – Drive results with forecast discipline and healthy pipeline coverage.

**Success Mindset**

- Measure quality over quantity.
- Coach around inputs that move outcomes.
- Operate in a consistent weekly → monthly → quarterly rhythm.

*"Operational excellence in sales is the engine behind consultative excellence."*

# Quota Attainment Strategy

1. **Start with Account Strategy**
   – Every dollar of quota should map to a **planned, prioritized account** with a defined revenue path.
   – **Quarterly account plan reviews** confirm evolving customer goals and strategic alignment.
   – Quota coverage should always be **intentional and documented**, not reactive.

2. **Balance the Portfolio Mix**
   – Balance isn't always about *new vs. existing business.*
   – Depending on the company and role, the right mix might be defined by **industries, client segments, product lines, or account tiers.**
   – The goal is to maintain a **diversified, deliberate portfolio** that supports sustainable quota attainment.
   – Review your mix **quarterly** to ensure effort and opportunity stay aligned with strategic goals.

3. **Manage Pipeline-to-Quota Ratio**
   – Maintain **3–5× pipeline coverage**, with healthy stage distribution.
   – Focus on **quality coverage** — pipeline tied to planned accounts and active buying activity.
   – Monitor mix contribution (e.g., which industries, segments, or solutions are driving progress).

4. **Establish a Personal Operating Rhythm**
   – Weekly: Inspect pipeline movement, validate next steps
   – Monthly: review account-plan progress and forecast accuracy
   – Quarterly: Assess portfolio mix and adjust focus as needed

# Pipeline Management Framework

1.  **Pipeline Quality, Not Quantity**
    –   Track by **source, stage, and maturity** (early/mid/late).
    –   Prioritize deals tied to validated success plans.

2.  **Key Health Metrics**
    –   Stage-to-Stage Conversion Rate → reveals bottlenecks.
    –   % of pipeline from prioritized accounts → signals focus discipline.
    –   Pipeline-to-Quota Ratio → early indicator of future risk.

3.  **Deal Review Focus Areas**
    –   What value proof is missing to move forward?
    –   Is there multi-stakeholder validation?
    –   Is next step defined and time-bound?

4.  **AI Support**
    –   Use tools like **Gong, HubSpot AI** to identify stuck deals, engagement drop-offs, and hidden risks.

# Forecasting Discipline

1. **Core Forecast Metrics**
   - **Forecast Accuracy (Commit vs. Actual)** – Target ≥90% accuracy.
   - **Deal Slippage Rate** – Monitor for cycle creep.
   - **Commit Confidence Score** – Add rep judgment layer

2. **Forecast Cadence**

| Frequency | Participants | Purpose |
|---|---|---|
| Weekly | AE + Manager | Update deal movement, risk, commit calls |
| Monthly | Sales Leadership | Roll-up review, conversion health & action planning |
| Quarterly | Exec Team | Strategic capacity and territory planning |

1. **AI Integration**
- Tools like Clari, HubSpot Forecast, Gong Forecast assist in predicting slippage and highlighting risk.

# High-Impact Sales Metrics Dashboard

| Pillar | Metric | Intent / Insight |
|---|---|---|
| **Account Strategy & Focus** | ▪ % of strategic accounts with an up-to-date account plan (quarterly)<br>▪ % of revenue from prioritized accounts | Ensures focus and effort align with highest-value targets. |
| **Relationship Depth & Coverage** | ▪ Stakeholder depth (3–5+ roles engaged)<br>▪ Executive-to-executive engagement (within 90 days) | Tests strength of influence, partnership, and advocacy. |
| **Account Progress & Momentum** | ▪ % of accounts with validated mutual success plan (goals + KPIs)<br>▪ Stage-to-stage conversion rate | Measures how well opportunities advance through the buying journey. |
| **Business Outcomes & Predictability** | ▪ Quota attainment (YTD / QTD)<br>▪ Forecast accuracy (Commit vs. Actual)<br>▪ Pipeline-to-quota ratio (target 3–5×) | Balances present performance with forward visibility. |

**How to Use**

- **Inspect weekly:** pipeline, conversion, and forecast discipline.
- **Coach monthly:** account plan quality, relationship mapping, and success plan adoption.
- **Review quarterly:** full 9-metric scorecard with leadership for continuous improvement.

## Here's Now What I Recommend…

John Routhier worked for us at Derby Management for a number of years where he took his deep experience as a sales executive and incorporated into that experience what we term as "The Science of Sales" which we honed to both an art and a science for the past five years.

The approach we take with our customers is that we provide the expertise of working directly with you and your sales team as both architects and builders creating a rock-solid foundation, constructing the walls while installing all the utilities to make your life as a manager and that of your salespeople highly efficient.

• We interview and work with hundreds of mangers and salespeople every year.
• We understand how your customers think, what's critical to them and how they want to buy

If you're interested in learning more, just connect with me at jack@derbymanagement.com or give me a call at 617-504-4222