STRATEGIC SELLING *Unleashed*

A Roadmap to Winning More Clients
Through Consultative Sales and Driving Urgency.

Ken Lundin

STRATEGIC SELLING UNLEASHED

The Opportunity to Close Roadmap

by

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Strategic Selling Unleashed: The Opportunity to Close Roadmap

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DEDICATION

To Makena and Riley — You'll never fully appreciate how much I learned about myself being your father. Much of the work in this book is based on those long days on a softball field or a tennis court, being "Coach Ken." It's all the mistakes — and the few successes — I had in figuring out how to influence your behaviors while trying to keep it fun. Trying to make it systematic so you could enjoy the success of doing it over and over again. And now, as I see you as adults, I couldn't be more proud to be your father and your friend.

To Stacey Henry — CEO and now retired! — from my very first client, Big Nerd Ranch, where the Opportunity to Close Roadmap was born. You and your team helped me hone what I consider the most successful enterprise selling methodology on the planet. And what a journey that was. But more than that, I appreciate the personal lessons I learned along the way — watching you go from CFO to CEO in very difficult business situations. Thank you for allowing me to call you a friend.

To Randy Riemersma — who gave me my first shot, my first lessons, and my entry into this wonderful world of consulting and training. I learned a massive amount from you — not just how to interact with clients, but how to interact in life and deal with the ups and downs.

To Randy Stacy — who taught me the value of staying in my circle. Only putting my emotional energy into those things I could actively change. And who undoubtedly had to listen to more of my crazy business ideas than anybody on the planet.

To the consultants and trainers who have worked with me over the years — whether directly for me, spoken on the same stages, or just been willing to share a cup of coffee and talk about their journey. Thank you for your time and your wisdom.

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Introduction

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It's Monday morning. You just got off the call. The one that's been on your calendar for three weeks. Your champion says the budget's approved, legal's on board, and they're ready to move forward. You're already calculating the commission. Already thinking about how this closes the quarter. Maybe you even text your spouse: "Big deal coming through."

By Wednesday, it's gone.

Not to a competitor. Not to budget cuts. Just… gone. Your champion stops responding. The VP who was "so excited" suddenly has "other priorities." The deal that was a lock two days ago is now stuck in some committee you didn't know existed.

Here's the deal—you already know something's wrong.

You've felt it. That sinking feeling when you're three months into a deal and suddenly nothing makes sense anymore. The feeling of thinking you've got it, then realizing you don't. You're working harder than ever—longer hours, more calls, better demos—and somehow the deals still slip away.

And here's what nobody wants to admit: most of the time, you never even had it.

I know this because I've been in the room with you. I've listened to the calls. I've sat in the pipeline reviews. I've coached the teams and led the organizations. Over the last eight years, I've worked with companies of every size—from startups fighting for survival to three companies that became unicorns. I've personally led a business from $2 million to $78 million in five years. I've trained more than a thousand salespeople and consulted with over 150 CEOs trying to figure out why their teams keep missing quota.

But let me tell you about one company that really proves this works.

In July 2017, I started working with Big Nerd Ranch—a software training and development company that was dying. And I mean dying. They'd been in a sales decline for two and a half years. Revenue going down every quarter. Their credit lines were maxed out. They'd just lost their largest account. They were on the verge of missing payroll. Not for the first time.

Can you imagine that? You're a manager, and you're not sure if you can pay your people this month. The stress. The fear. The sleepless nights wondering how you're going to look them in the eye if the checks bounce.

That's where they were when we walked in.

We implemented the Opportunity to Close (O2C) framework. We started with a baseline audit—figured out what skills the team had, what they were missing, what beliefs were getting in the way. Then we put the scoring system in place. Every deal got scored. Every pipeline review focused on what was weak and how to fix it.

The results:

$4.5 million in net new sales in the first six months. That was a 40% year-over-year increase.

$12.2 million in sales in the first 18 months.

312% growth in three years.

528% growth in five years.

The company went from doing $10 million on the edge of bankruptcy to $60 million… and then was acquired by a New York Stock Exchange-listed company.

Here’s the part that should really get your attention: They did it with essentially the same sales team. They had four salespeople when they were doing $10 million. They had six salespeople when they hit $60 million. Same people. Better system.

Let me tell you about one of those people. His name was Rodrigo. When we started, Rodrigo was on a PIP—a performance improvement plan. That’s corporate speak for “you’re about to get fired.” He wasn’t hitting his numbers. He was struggling. He was probably updating his resume.

Six months later, Rodrigo had sold $2.5 million.

The following year, just under $5 million.

Two years after that, he closed a single deal for $21.7 million. He became the number one salesperson in the company. Over five years, Rodrigo sold more than $70 million.

Same guy. Same market. Same products. Different system.

Or take Don. He focused on a single account. When we started working together, that account was spending $400,000 a year. Four years later? $38 million. He took it from $400K to $4 million, then to $38 million. One account. One salesperson. Systematic execution.

That’s what O2C can do.

I get two questions every single day from sales leaders and reps:

“How do I get my team to sell more consultatively?”

“How do we drive more urgency in our deals?”

These aren't random problems. They're symptoms of a bigger issue: Most salespeople don't have a systematic way to qualify and advance opportunities. They're flying blind. They're telling themselves stories about why deals are going to close—stories based on hope, not validation.

Here's the data that should terrify you: 91% of organizations missed quota in 2024. Let that sink in. Nine out of ten companies failed at sales forecasting. And six of the eight conditions that caused those failures were completely within their control.

Sales rep turnover is at 35%—three times higher than any other profession. Average tenure is 18 to 20 months. Think about what that means for you. If you're a sales manager, you're constantly rebuilding your team. If you're a rep, you're changing jobs every year and a half because you can't hit quota, and you don't know why.

And here's the kicker: 40% to 60% of deals don't get lost to competitors. They die to "no decision." Status quo wins. The prospect decides to do nothing, and you just wasted three months of your life on a deal that was never going to happen.

This book solves that problem. Everything in here is actionable. No theory. No fluff. Just a system you can use tomorrow on real deals to identify what's weak and fix it before it kills your opportunity.

By the time you finish this book, you'll be able to:

Look at any opportunity in your pipeline and know—objectively—whether it's real or fiction.

Identify the exact areas where your deal is weak before it costs you the close.

Ask the right questions at the right time to move deals forward—not just spin your wheels.

Disqualify time-wasters faster so you can focus on deals that actually have a shot.

Forecast with confidence because your pipeline is full of validated opportunities, not happy ears and commission breath.

The O2C framework scores every deal across six categories: Business Needs, Ambassador, Decision Maker, Competitors, Decision Process, and Paper Process. Each category gets a score from 0 to 3. Maximum score: 18. My rule of thumb: Before you present any proposal, demo, or formal solution, you should aim for at least a 2 in every category. That's a 12 out of 18 minimum. Anything less, and you're rolling the dice.

Improve the score, improve your opportunity to close. It's that simple.

This book is for anyone who sells in a complex B2B environment. If you're an entrepreneur trying to figure out how to close your first big deal, this is for you. If you're a founder who needs to build a repeatable sales process, this is for you. If you're a sales manager whose team keeps missing quota and you don't know why, this is for you. If you're an individual rep who's tired of working deals that go nowhere, this is for you.

It doesn't matter if you're new to sales or if you've been doing this for 20 years. O2C works for both. I've seen brand-new reps use this to close their first deal in 90 days. I've seen top performers use this to go from $5 million to $21 million.

I've sold to small business owners and Fortune 10 executives. The framework is the same. The questions adjust based on the complexity of the deal and the size of the organization, but the core discipline—validate, don't assume—never changes.

Don’t read this book all at once.

Seriously. If you try to consume all nine chapters in one sitting, you’ll walk away with information overload and no action. Instead, do this:

Read one chapter. Score your current opportunities against that category. Make a plan to improve the weak areas. Execute on that plan for a week. Then read the next chapter.

Read. Score. Plan. Execute. Repeat.

You can download the O2C scorecard at revheat.com/book. Print it out. Use it in every pipeline review. Make it part of your weekly routine. The scorecard is your forcing function—it won’t let you bullshit yourself about how good a deal really is.

And here’s what I want more than anything: When this works for you—when you close a deal you would have lost, when you disqualify a time-waster earlier, when you finally crack an account you’ve been chasing—email me at O2C@revheat.com.

Those stories fuel me. They prove this works. And they help other people believe it can work for them too.

Alright. Enough preamble. Let’s go make some money.

CHAPTER 1

7 Reasons You Lose Deals

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The Punch in the Gut

Here's the deal—you already know something's wrong.

Maybe it's that deal you were *sure* was going to close last quarter. You had the verbal yes. You had the handshake. You were already calculating the commission. Then Wednesday rolled around, and suddenly they needed "more time to think." Then they went dark. Then you found out they signed with your competitor. Or worse—they did nothing at all.

Here's a stat that should make you uncomfortable: **91% of organizations missed their quota expectations in 2024.** Not individuals—*organizations*. Whole companies full of salespeople, sales managers, enablement teams, and fancy CRMs… and 9 out of 10 still missed the number.

And if you think that's painful, try this one: Studies show that **40-60% of all deals in your pipeline right now will be lost to "no decision."** Not to a competitor. Not to budget cuts. To *nothing*. The prospect will simply decide that keeping things the way they are is easier than choosing you.

That's not a competitor problem. That's a *you* problem. And more specifically, it's a qualification problem, a differentiation problem, and a "you didn't understand what was really going on" problem.

I've spent 25 years in B2B sales—sitting in rooms, listening to calls, coaching reps, leading organizations. I've helped companies go from the edge of bankruptcy to acquisition. I've watched individual reps go from performance improvement plans to becoming the #1 seller in their company. And I've seen thousands of deals die preventable deaths.

What I'm about to share with you are the seven reasons I see deals die over and over again. These aren't theories. They're patterns I've watched play out across industries—SaaS, consulting, technology, cybersecurity, professional services. The specifics change; the underlying failures don't.

The good news? Every single one of these is fixable. The rest of this book is going to show you how.

But first, you need to see yourself in these mistakes. Because I promise you—you're making at least three of them right now.

Reason 1: Lack of Preparation

Let me tell you what lack of preparation actually looks like.

It doesn't look like showing up without a slide deck. That's amateur hour—most people have moved past that. The real lack of preparation is more insidious. It's the belief that you already know what's going on.

I call this **"Happy Ears."**

Happy Ears is when you believe the prospect without exercising a healthy amount of skepticism. They say, "This looks great, we're definitely interested"—and you write it down as a commit. They mention budget might be tight, but they "should be able to work something out"—and you hear "we have the money." They tell you they need to "run it by a few people"—and you assume that's a formality.

Happy Ears will kill your pipeline faster than any competitor ever could.

What lack of preparation actually costs you:

Limited knowledge of the prospect means you miss crucial information about their real needs and pain points. You're solving a problem they told you about in the first meeting, but their *actual* problem is three levels deeper—and your competitor figured that out.

Failure to qualify means you spend 80% of your time on opportunities that had a 20% chance of closing. Meanwhile, the deals that *could* close are dying from neglect.

Ineffective communication happens when you can't articulate why your solution matters *specifically to them*. The most common mistake I see? Salespeople explain why their solution is valuable without ever connecting it to why it's valuable *for this particular prospect*.

Here's a diagnostic question: When you're describing your top opportunities to your manager, do you find yourself saying things like "I think they're going to move forward" or "They kind of indicated they have budget" or "We sort of have a timeline"?

Those words—*I think, kind of, sort of*—are red flags. They mean you're assuming instead of validating. They mean you're hoping instead of knowing.

We'll fix this in Chapters 3 through 8, where I'll show you exactly how to score your opportunities and know—with data, not gut—where you actually stand.

Reason 2: Failure to Understand the Prospect's Needs

Here's something that will sound obvious but almost nobody does well:

Your job is not to sell your product. Your job is to understand their problem better than they do.

I can't tell you how many times I've seen this scenario play out: A prospect comes in believing they know exactly what they need. They've done their research. They've read the G2 reviews. They've talked to their peers. They have the requirements document ready to go. And then, after a few conversations with a *good* salesperson—one who actually digs in and asks the hard questions—they buy something completely different than what they originally wanted.

Prospects think they know what they need. **They're often wrong.** Not because they're stupid, but because they're too close to the problem. They're treating symptoms, not causes. They're solving for today's pain without seeing next quarter's cliff.

The three ways you fail to understand needs:

1. You focus too much on your product. You're so excited to show the demo, share the case study, and explain your differentiators that you skip the part where you actually understand what they're trying to accomplish. Here's a test: Can you articulate, in *their* words, why they need to solve this problem and what happens if they don't? If not, you've got more work to do.

2. You make assumptions. You've sold to companies like this before. You know the industry. You've heard these problems a hundred times. So you fill in the blanks instead of asking. The moment you start assuming, you stop listening.

3. You don't ask enough questions. Whether you're new to sales or you've been doing this for decades, it's easy to fall into this trap. If you're elite, you think you already have the answers. If you're new, you don't know what to ask. Either way, you're leaving buying reasons on the table.

Here's a phrase I live by: **It's more important for the prospect to hear themselves say it than for us to tell them.**

When *they* articulate the problem, the cost of inaction, and the value of the solution—it's real. When *you* tell them? It's a sales pitch. And people are skeptical of sales pitches.

Chapter 5 is entirely dedicated to Business Needs and Motivation—how to uncover it, how to validate it, and how to use it to close.

Reason 3: Poor Qualification Process

Studies say as much as **70% of deals are lost due to poor qualification.**

Let that sink in. Seven out of ten lost deals could have been identified as losers before you invested all that time.

Here's a gut-check for you. Right now, open your CRM—or just picture your pipeline in your head. Ask yourself:

How many opportunities have no scheduled next step?

How many were supposed to close last month but are still sitting there?

How many have you been "working" for 90+ days without any clear progress?

If the answer to any of those is more than zero, you have a qualification problem.

What poor qualification actually looks like:

Pursuing unqualified leads because you need pipeline and activity feels like progress. But activity without qualification is just busywork. You're burning time on opportunities that will never close while your real opportunities are being ignored.

An ineffective discovery process where you treat discovery as a single meeting instead of an ongoing conversation. You get surface-level answers and assume you've got the full picture. You don't.

Lack of clear qualification criteria means you can't explain why one deal is better than another. Here's a question: Have you ever been *surprised* by a sale? Like, genuinely didn't expect it to close? That's a sign your qualification criteria is unclear. If you can't predict it, you don't understand it.

The scoring system I'm going to teach you—the Opportunity to Close Roadmap—is designed to replace gut feelings with data. You'll know, with specificity, exactly where each deal stands and what needs to happen next.

That's Chapter 2 and beyond. But first, let's keep going.

Reason 4: Failure to Establish Trust and Rapport

This one gets talked about so much that it's become meaningless. "Build rapport." "Establish trust." Great—*how?*

Let me reframe this for you.

The old way of thinking was that you needed prospects to like you. Find common ground. Talk about their golf game. Comment on the photo of their dog. Be personable.

That's not wrong, but it's not enough. And in today's environment—where 80% of B2B interactions happen virtually and everyone's been burned by a friendly salesperson before—likability alone won't get you there.

What matters is that they trust you and value you. Not like you. *Trust* you.

What failure to establish trust looks like:

1. Lack of empathy. Can you clearly articulate *why the prospect personally needs* to invest in your solution to ensure their own success or reduce their personal risk? Notice I didn't say "why the company needs it." I said why *they* need it. The person you're selling to has a career, goals, a boss they want to impress, and risks they want to avoid. If you can't articulate how you help them specifically, you haven't built trust.

2. Lack of personalization. As my client Jayson Truttman says, "You have to put on their company shirt." Generic pitches feel generic. Prospects need to know that you understand their problems, goals, and unique circumstances better than anyone else does. A tactic you can use today: Make your presentation look and feel like *their* brand instead of yours.

3. Lack of authenticity. Have you ever found yourself going through the motions? Checking boxes? Saying the words without really meaning them? We've all been there. And it costs deals. People can sense when you're just trying to close them versus when you actually give a damn about solving their problem.

Trust isn't built through tricks. It's built through competence, genuine curiosity, and consistent follow-through. Chapters 3 and 4 will show you how to build the internal relationships—Ambassadors and Decision Makers—that make trust tangible.

Reason 5: Ineffective Communication

Here's something nobody wants to talk about: Most salespeople are bad at communicating under pressure.

Only **11% of sales professionals feel very confident during customer calls.** And **70% identify objection handling as their top challenge.** That's not a skills gap—that's a crisis.

What ineffective communication looks like:

1. Lack of clarity. If the prospect doesn't understand your value proposition, they won't buy. Period. But here's the harder truth: If they don't understand *why your value proposition matters specifically to them*, they also won't buy. Seeking clarity throughout the sales process is a superpower. It means you're always aligned with the prospect, moving toward an obvious conclusion together.

2. Failure to listen. What happens when a prospect says something unexpected? Objects to your point of view? Asks a hard question? Do you feel your gut tighten? Do you tune them out while you formulate your response? That's lack of emotional discipline—and it has probably cost you thousands of dollars in lost opportunities. When you stop listening to think, you miss critical information.

3. Poor timing. Have you ever had a deal that seemed incredibly promising—you could taste the win—and then pushed too hard at the wrong moment and watched it fall apart? I call this **“commission breath.”** Your prospects can sense it from miles away. When you push for the close before they’re ready, you don’t look confident—you look desperate.

The 63% of sales interactions that end without asking for the sale? That’s a communication failure. The deals lost because someone pushed too hard, too early? That’s also a communication failure.

Chapter 6 covers the APAC objection handling model, and every chapter has specific scripts for what to say and when to say it. No more winging it.

Reason 6: Failure to Stand Out from Competitors

Let me ask you a question: What’s your biggest competitor?

If you named another company—a direct competitor, someone who sells something similar—you’re wrong.

Your biggest competitor is **the status quo.** The decision to do nothing. Keep things the way they are. “Maybe next quarter.” “We need to think about it.” “Not the right time.”

40-60% of deals are lost to “no decision.” That’s not a competitor stealing your business. That’s the prospect deciding that the pain of change isn’t worth the benefit.

Here’s the brutal math: If you lose to the status quo, you failed to differentiate. Not against other vendors—against *inaction*.

What failure to differentiate looks like:

You can beat every other vendor in a competitive evaluation and still lose. Why? Because you never made the case for why changing is better than staying the same. You focused on why you’re better than the competition without first proving why *doing anything at all* is worth it.

This is why Chapter 5 on Business Motivation is so critical. Before you can win against competitors, you need to win against the prospect’s natural resistance to change.

Then, and only then, can you worry about differentiating against other solutions. Chapter 6 will show you exactly how to position against competitors—including how to handle price objections and when to walk away because you’re not actually the best fit.

Reason 7: Lack of Authority and Funding

Let me tell you about Alex and Rebecca.

A software company—let’s call them PremiumSaaS—was working a significant deal. During the sales process, they identified Alex, a department head, as their main contact. Alex was enthusiastic. Alex loved the solution. Alex said all the right things.

PremiumSaaS made a classic mistake: They assumed Alex was the Decision Maker.

Months went by. Proposals were sent. Demos were delivered. Everyone felt good about the deal.

Then PremiumSaaS got the call: They lost. The prospect went with a competitor.

What happened? Alex did his best to sell the solution internally, but the actual Decision Maker was Rebecca, the CFO. Alex couldn’t articulate the financial and strategic benefits the way Rebecca needed to hear them. He didn’t have the relationships, the credibility, or the tools to make the case.

PremiumSaaS never even met Rebecca. They sold to the wrong person.

What lack of authority and funding looks like:

You invest hours in opportunities that may never materialize because you're not talking to the person who can actually say yes.

You think you have budget confirmation because your contact said "we should be able to find the money"—but you've never validated it with the person who controls the budget.

You confuse enthusiasm for authority. Someone loving your solution doesn't mean they can buy it.

Remember PremiumSaaS from earlier? They spent months working with Alex, who loved their solution. But Alex wasn't the Decision Maker—Rebecca, the CFO, was. And PremiumSaaS never met her. They lost a $4 million deal because they confused enthusiasm for authority.

We'll fix this in Chapters 3 and 4.

The Compounding Effect

Here's what makes these seven reasons so dangerous: **They don't happen in isolation. They compound.**

Poor qualification leads to wasted time. Wasted time leads to pressure. Pressure leads to commission breath. Commission breath destroys trust. Without trust, you can't get to the real decision maker. Without the decision maker, you can't validate funding. Without validated funding, you lose to no decision.

One mistake creates the conditions for the next mistake.

The good news? The opposite is also true. Good qualification creates time. Time creates thoughtful engagement. Thoughtful engagement builds trust. Trust gets you access to decision makers. Access lets you validate funding and create urgency. Urgency closes deals.

The system I'm about to teach you—the Opportunity to Close Roadmap—is designed to break the negative cycle and create the positive one. It gives you a step-by-step process to evaluate every opportunity, identify weaknesses before they kill the deal, and take specific actions to strengthen your position.

But before we dive into the six categories, you need to understand why scoring matters and why this methodology is different from everything else you've tried.

Chapter 2 is going to challenge everything you think you know about sales training.

CHAPTER 2

Why Use a Sales Methodology?

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The Twenty Billion Dollar Question

Here's a number that should make you angry: Twenty billion dollars.

That's how much companies spend on sales training every year. Twenty billion. And yet,

91% of organizations still missed their quota expectations in 2024.

Let that sink in. Billions of dollars flowing into workshops, seminars, online courses, coaching programs, and motivational speakers. Armies of trainers deployed. Weeks of sales kickoffs. Endless role-playing sessions. And at the end of it all, nine out of ten companies still can't hit their number.

Something is fundamentally broken.

I've spent 25 years trying to figure out what. I've trained over a thousand salespeople. I've consulted with more than 150 CEOs. I've helped companies go from the edge of bankruptcy to successful acquisition. I've watched individual reps transform from being on performance improvement plans to becoming the number one seller in their company.

And I can tell you exactly why most sales training doesn't stick:

It teaches theory instead of a system you can use tomorrow.

Over 50% of sales training is forgotten within five weeks. Not five months. Five

weeks. You sit through a two-day workshop, you get fired up, you take notes, you tell yourself this time it's going to be different. And then you walk into your next sales call and do exactly what you've always done.

Why? Because you learned concepts, not a process. You learned what to think about, not what to do. You got inspiration without implementation.

This book is different. And I'm going to show you why.

A Quick Nod to What Came Before

I'm not the first person to try to systematize sales. Smart people have been working on this for decades, and there's good stuff out there. Let me give credit where it's due:

BANT (Budget, Authority, Need, Timeline) came from IBM in the 1950s. It's a qualification framework that helps you figure out if a deal is real. Still useful, still taught.

SPIN Selling came from Neil Rackham in 1988. Situation, Problem, Implication, Need-Payoff. It's a questioning methodology based on real research. I actually wrote a published article about SPIN early in my career.

MEDDIC (Metrics, Economic Decision Maker, Decision Criteria, Decision Process, Identify Pain, Champion) was developed at PTC in the 1990s. It's a rigorous qualification framework that's particularly popular in enterprise software.

Challenger Sale came from Brent Adamson and Matthew Dixon in 2011. It emphasizes teaching prospects something new and challenging their assumptions.

Value Selling from Tom Reilly focuses on understanding needs and demonstrating value rather than competing on price.

I've used all of these. There's good in each of them. I'm grateful to everyone who came before me trying to help people like you sell more effectively.

So what makes what I'm about to teach you different?

The O2C Difference

At RevHeat, we are practitioners first, trainers and consultants second. The biggest question we answer with every book we write, every training we deliver, every consulting engagement we take on is this:

How can we make this practical, tactical, and actionable for YOU to use today?

Not next quarter. Not after a six-month implementation. Today. On your next call.

The Opportunity to Close Roadmap—what we call O2C—is not just another sales methodology. It's a

Sales Opportunity Improvement Tool. Think about that phrase. It's designed to take any deal you're working on and make it stronger. More qualified. More likely to close.

Here's how it works: Instead of giving you abstract concepts to think about, O2C gives you a scoring system. Every opportunity you're working on gets scored across six specific categories. Each category scores from 0 to 3. The higher your score, the higher your probability of winning.

Simple? Yes. But that simplicity is the point.

When you sit down with your manager or your team to review pipeline, you're not telling stories. You're not explaining context. You're not spinning narratives about why a deal is going to close. You're looking at scores.

And here's what I've learned after thousands of hours coaching salespeople:

Every time someone starts a sentence with 'Let me give you some context about this opportunity' or 'Let me give you some background,' they're selling you on why it's a good deal.

Storytelling equals fiction. Fiction equals poorly qualified deals.

O2C replaces storytelling with data. It replaces hope with honesty. It replaces gut feelings with a prescriptive process that tells you exactly what's weak in your deal and what to do about it.

Why Scoring Changes Everything

You might be thinking: Scoring? Really? That seems too simple.

Let me tell you why scoring is the most powerful thing I've ever introduced into a sales organization.

First, it forces focus. When you look at your pipeline through the lens of scores, you immediately see which deals deserve your time and which ones are just taking up space. That opportunity you've been 'working' for four months with a score of 6 out of 18? Stop working it. That opportunity with a score of 14 that you've been neglecting because it seemed too easy? Double down.

Second, it removes subjectivity. "Is this a good deal?" is a question that gets answered ten different ways by ten different salespeople. "What's the score?" has one answer. And that answer is based on specific, verifiable criteria—not vibes.

Third, it creates accountability. When you and your manager are speaking the same language—the language of scores—there's nowhere to hide. You can't claim a deal is solid when the score says otherwise. And you can't get credit for activity that isn't moving deals forward.

Fourth, it predicts outcomes. This is where it gets really interesting. After implementing O2C with dozens of companies, we have data on what scores correlate with what close rates. Deals that go to proposal with a score above 12? They close at dramatically higher rates than deals that go to proposal with a score of 8. The score isn't just a diagnostic tool—it's a forecasting tool.

Fifth, it gives you a roadmap. When you see that your Decision Maker score is a 1 but your Ambassador score is a 3, you know exactly what to do next: Get a meeting with the Decision Maker. When your Business Motivation score is a 2 but your Competitors score is a 0, you know your next call needs to uncover who else they're talking to. The score tells you what's wrong. The framework tells you how to fix it.

The simple truth is this:

Improve the score, improve the opportunity to close.

That's where the name comes from. Opportunity to Close. O2C.

Here's what the data shows: After implementing O2C with 100 companies over 8 years, deals with a total score above 14 close at rates 3-4x higher than deals with scores below 8.

Think about what that means: If your typical close rate is 20%, and you focus only on deals scoring 12+, you could be closing at 60-80%. Same effort. Better filtering. Dramatically better outcomes.

The Six Categories

Let me introduce you to the six categories you'll be scoring for every opportunity. Each one gets its own chapter later in this book, where I'll go deep on how to assess, how to improve, and exactly what questions to ask. For now, here's the overview:

1. Business Needs and Motivation

How urgent and important is the prospect's problem? How well do you understand their needs—not just the tactical issue they mentioned, but the strategic priority driving the decision? Do they have a compelling reason to act now, or is this something they could push to next quarter… or next year… or never?

2. Ambassador

Do you have someone inside the account who is actively working on your behalf? Not just someone who likes you—someone who understands your differentiation and is selling for you when you're not in the room. Someone who has skin in the game because your success is tied to their success.

3. Decision Maker

Have you identified and engaged with the person who can actually say yes? Not the person who can say no—that's easy. The person who holds the purse strings. Have you validated that they have budget? Have you confirmed this is a priority for them? Have you found the compelling event that makes them need to decide by a certain date?

4. Competitors

Who else are they talking to? What's your differentiation? Can the prospect articulate why you're better—or are you just hoping they'll figure it out? And don't forget the biggest competitor of all: the status quo. The decision to do nothing. Have you made the case for change, not just the case for you?

5. Decision Process

How do they make decisions like this? What criteria will they use to evaluate you? Who else needs to weigh in? What's the timeline? You can have the best solution, the right Decision Maker, and strong business motivation—and still lose because you didn't understand how they were going to decide.

6. Paper Process

What happens between "yes" and "signed"? Legal review. Procurement. Internal approvals. Security assessments. Vendor registration. Every company has a paper process, and most salespeople don't ask about it until it's too late. How many deals have you lost to "end of quarter" because you didn't know it takes their legal team three weeks to review contracts?

Each of these categories scores from 0 to 3:

0 means you have no information. You're flying blind.

1 means you've identified something, but it's unvalidated or incomplete.

2 means you've validated with the right people, but there's still something missing.

3 means you've got it locked. Confirmed. Solid.

Maximum score: 18. My rule of thumb:

Before you present any proposal, demo, or formal solution, you should aim for at least a 2 in every category. That's a 12 out of 18 minimum. Anything less, and you're rolling the dice.

Proof It Works: The Big Nerd Ranch Story

Let me tell you about a company that was dying.

In July 2017, we started working with Big Nerd Ranch, a software training and development company. When we got there, the situation was dire:

They'd been in a sales decline for two and a half years. Not a dip—a

slide. Revenue going down every quarter.

Their credit lines were maxed out.

They had just lost their largest account.

They were on the verge of missing payroll. Not for the first time.

Can you imagine that? You're a manager or an executive, and you're not sure if you can pay your people this month. The stress. The fear. The sleepless nights wondering how you're going to look them in the eye if the checks bounce.

That's where they were when we walked in.

Here's what we did: We implemented O2C. We started with a baseline audit—figured out what skills the team had, what they were missing, what beliefs were getting in the way. Then we put the scoring system in place. Every deal got scored. Every pipeline review focused on what was weak and how to fix it.

The results:

$4.5 million in net new sales in the first six months. That was a 40% year-over-year increase.

$12.2 million in sales in the first 18 months.

312% growth in three years.

528% growth in five years.

The company went from doing $10 million on the edge of bankruptcy to $60 million... and then was acquired by a New York Stock Exchange-listed company.

Here's the part that should really get your attention:

They did it with essentially the same sales team. They had four salespeople when they were doing $10 million. They had six salespeople when they hit $60 million. Same people. Better system.

Let me tell you about one of those people. His name was Jim. When we started, Jim was on a PIP—a performance improvement plan. That's corporate speak for "you're about to get fired." He wasn't hitting his numbers. He was struggling. He was probably updating his resume.

Six months later, Jim had sold $3 million.

The following year, he sold $9 million.

The year after that, $21.7 million. He became the number one salesperson in the company.

Same guy. Same market. Same products. Different system.

That’s what O2C can do.

Sales Is 75% Science, 25% Art

I’ve had people argue with me about this. “Ken, you can’t systematize sales. Every deal is different. Every buyer is different. It’s an art.”

Here’s what I tell them:

You’re right that there’s art in it. But if you’re relying on the art to carry you, you’re gambling.

My hypothesis—and I’ve tested this with thousands of salespeople—is that the act of selling is mostly science. About 75% science, 25% art.

The science is the process. It’s knowing what questions to ask. It’s understanding what a 2 looks like versus a 3 in Decision Maker engagement. It’s having a framework that tells you: Here’s what you need to know, here’s how to find it out, here’s what to do when you get stuck.

The art is how you do it. The tone of voice. The timing. The ability to read a room. The instinct to know when to push and when to back off.

Here’s why this matters: If you only have the art, you’re at the mercy of your instincts. And instincts are inconsistent. They work great when you’re feeling confident, terrible when you're feeling stressed. They're shaped by your last win or your last loss in ways you don't even realize.

But if you have the science—if you have a process—then the art can shine. You're not improvising the whole thing. You're improvising within a structure. Like a jazz musician who knows the chord changes and can riff on top of them.

O2C gives you the science. The rest of this book shows you how to apply it.

How to Use This Book

Before we go any further, let me tell you how to get the most out of what you're about to read.

Don't read this book all at once.

I know that sounds strange. Most authors want you to devour their book in a weekend and leave a glowing review. But this isn't that kind of book. This is a working tool.

Here's what I recommend:

Read one chapter. Understand the category, the scoring, the questions.

Then stop. Go through your current pipeline. Score every opportunity on that category. Be honest—not hopeful. What's actually a 3? What's really a 1?

Develop a plan. For every opportunity that's below a 2 in that category, what's your next step to improve it? What question do you need to ask? What meeting do you need to schedule?

Execute for a week. Make the calls. Have the conversations. Apply what you learned.

Then read the next chapter. And repeat the process.

By the time you finish this book, you won't just have read about O2C—you'll have used it. On real deals. With real results.

There's a scoring cheat sheet in the Appendix if you want to see all six categories at once. You can also download the O2C scorecard at revheat.com/book. But I'd encourage you to go chapter by chapter. Let each category sink in before you add the next one.

What Happens If You Don't

Let me be direct with you about what happens if you read this book and don't apply it.

You go back to forecasting based on gut feelings and hoping for the best.

You continue to be surprised when deals you thought were solid disappear. You continue to spend time on opportunities that were never going to close. You continue to miss quota because your pipeline is full of fiction instead of qualified deals.

The statistics I shared in Chapter 1 aren't going away. 91% of organizations missed quota in 2024. Average sales rep turnover is 35%—three times higher than any other profession. Reps change jobs every 18 to 20 months. 40-60% of deals are lost to "no decision."

Think about what that means for your life. Your income is unpredictable. Your job security is fragile. Your stress is constant. And every quarter, you're starting over, hoping this time will be different.

It doesn't have to be that way.

What Happens If You Do

I've watched Jim go from PIP to $21.7 million.

I've watched Rodrigo go from selling nothing to selling $70 million over five years.

I've watched companies go from the edge of bankruptcy to successful acquisitions.

I've watched salespeople who were updating their resumes become the top performers their companies couldn't imagine losing.

This works. If you work it.

The deals you're working on right now—they're going to go one of three ways. You win them. You lose them to a competitor. Or they die to "no decision." O2C increases your odds in all three scenarios. It helps you identify winners earlier, disqualify losers faster, and make the case for change that beats the status quo.

What would it mean for you if you closed 300% more of your existing opportunities? Instead of $1 million, you close $3 million. Instead of scraping by, you're crushing quota. Instead of worrying about your job, you're fielding offers from competitors.

That's not fantasy. One of our clients proved it—they closed an additional $14 million in a single quarter after implementing O2C.

Same pipeline. Better system. Different results.

One Last Thing

What I want more than anything from this book is to hear from you.

If you apply what's in these pages and something changes—if you close a deal you would have lost, if you disqualify a time-waster earlier, if you finally crack an account you've been chasing—I want to know about it.

Email me at O2C@revheat.com.

Those stories fuel me. They prove this works. And they help other people believe it can work for them too.

Alright. Enough preamble. Let's get into the first category.

Chapter 3 is all about finding and developing your Ambassador—the insider who's going to sell for you when you're not in the room.

Let's go.

CHAPTER 3

The Power of an Ambassador

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You Can't Win Alone

Here's something top performers know that everyone else learns the hard way: You cannot close complex B2B deals by yourself.

I don't care how good you are. I don't care how compelling your solution is. I don't care if you've got the best ROI calculator in the industry and a slide deck that would make Steve Jobs jealous.

If you're going into a sale as a lone wolf—you as the salesperson trying to convince them as the company—you're fighting an uphill battle you'll lose more often than you should.

The top performers? They don't work alone. They cultivate an insider. Someone who knows how decisions get made, who the real influencers are, what the unspoken concerns are. Someone who goes to bat for them when they're not in the room.

We call that person an Ambassador.

And if you don't have one, your deal is in serious trouble.

Ambassador vs Champion vs Decision Maker: Let’s Get Clear

Before we go any further, we need to define terms. Because I’ve heard salespeople use “champion,” “ambassador,” “coach,” “sponsor,” and about fifteen other words to describe the same thing—or different things they think are the same thing.

Here’s the distinction that matters:

Ambassador: A person inside the account who actively promotes your solution and works on your behalf to help you win. They can introduce you to the Decision Maker, explain your differentiation internally, navigate internal politics for you, and tell you what’s really happening. What they can’t do: Sign the check.

Champion: Someone who likes you and supports your solution but may not be actively selling internally. They can answer your questions, give you information, and express enthusiasm. What they can’t do: Drive action when you’re not there.

Decision Maker: The person with authority and budget to say yes. They can sign the check and make the final call. What they can’t do: Necessarily sell your solution internally (that’s why you need an Ambassador).

The key word is “actively.”

A Champion is nice to have. They’ll take your call. They’ll tell you they like what you’re doing. But when the meeting happens without you—when your name comes up in the executive conference room or the budget discussion or the vendor comparison—a Champion might not say anything at all.

An Ambassador? They're in that meeting making your case. They're explaining why you're different. They're addressing objections before you even hear about them. They're putting their reputation on the line to advocate for you.

Here's how I define an Ambassador:

"A person who represents and promotes your company and supports your solution through words and actions. They understand how you're different and are ACTIVELY working on your behalf to help you secure the business."

Notice what's not in that definition: They don't need to be able to sign the check. In fact, in most complex B2B sales, your Ambassador won't be the final Decision Maker. That's okay. What they can do is get you to the Decision Maker and make sure you're positioned correctly when you get there.

Your goal isn't to find someone who likes you. Your goal is to turn contacts into Ambassadors—people who are selling for you when you're not in the room.

The Scoring System (0–3)

Let me show you how to evaluate whether you actually have an Ambassador or just someone who's being polite.

Every opportunity you're working on gets scored on Ambassador engagement from 0 to 3. Here's what each score looks like:

Score 0: No Ambassador Identified

What it means: You have no idea who your internal advocate is—or if you even have one.

What it looks like: You're emailing into the void. You have a contact, maybe, but you don't know if they're actually doing anything for you. You’re hoping someone inside is talking about you, but you have no confirmation.

What you’re thinking: “They seem interested…”

This is the danger zone. If you’re at a 0, you’re not in control of the sale. You’re waiting and hoping. And hope is not a strategy.

Score 1: Identified and Met, But No Personal Win Articulated

What it means: You’ve identified someone who could be an Ambassador. You’ve met with them. But they haven’t told you what’s in it for them personally, and they haven’t demonstrated real commitment.

What it looks like: They’re friendly. They answer your emails. They say things like “this looks interesting” or “let me run this by a few people.” But you don’t know why they personally care about this project succeeding.

What you’re thinking: “I think Sarah’s on board…”

You’re better than a 0, but you’re still not solid. Without understanding their personal win, you don’t know if they’ll actually fight for you when things get hard.

What a Fake Score 2 Looks Like:

“I’ve got a great relationship with Sarah. She loves our product. She’s definitely our champion.”

Red flags:

“Great relationship” = they’re friendly, not committed

“She loves our product” = enthusiasm, not advocacy

“She’s definitely our champion” = you’re assuming, not validating

Real Score: 1 at best. You’ve got someone who likes you, not someone who’s fighting for you.

Score 2: Personal Win Confirmed, Actively Supporting, But Haven’t Taken You to Decision Maker

What it means: They’ve told you why this matters to them personally. They’re helping you. They’re giving you inside information. But they haven’t connected you with the person who can actually say yes.

What it looks like: They’re engaged. They’re responsive. They’re telling you things like “If we can get this done, it’ll help me hit my Q3 targets” or “My boss has been pushing us to solve this.” But when you ask to meet the Decision Maker, you get “Let me work on that” or “Not yet.”

What you’re thinking: “They love us, but…”

This is where a lot of deals get stuck. You’ve got someone who’s supportive, but you don’t have access. And without access, you can’t validate what really matters or build relationships with the people who control the budget.

Score 3: Taken You to Decision Maker, Actively Selling on Your Behalf

What it means: They’ve introduced you to the Decision Maker. They’ve confirmed they’re advocating for you internally. You have evidence—not just their word—that they’re promoting your solution when you’re not there.

What it looks like: They've said things like "I already talked to the CFO about you" or "I'm setting up a meeting with the executive team to present this." They're forwarding you internal emails where your solution is being discussed. They're telling you what objections are coming up and helping you prepare responses.

What you're thinking: "We've got a real advocate here."

This is where you want to be. A Score 3 Ambassador dramatically increases your win rate. They're doing the internal selling you can't do. They're building consensus. They're de-risking the decision by putting their credibility behind you.

Here's the bottom line: If you're below a 2, you don't really have an Ambassador yet. You might have a friendly contact. But you don't have someone who's fighting for you.

The "Personal Win" Concept

Let me tell you why Ambassadors advocate for you: Because your success helps them succeed.

This is the single most important concept in Ambassador development, and it's the thing most salespeople completely miss.

People don't go to bat for vendors because they're nice. They don't put their reputation on the line because they enjoyed the demo. They advocate for solutions that help them achieve their goals, solve their problems, or reduce their personal risk.

If they don't have skin in the game, they won't fight for you.

So what's a "personal win"?

It’s the answer to this question: “What does this person get if your solution succeeds?”

Not what the company gets. Not what the ROI is. What does this specific person—your Ambassador—get out of it?

Here are examples of personal wins:

Career milestone: “If we can automate this process, I’ll finally have time to focus on strategic projects instead of firefighting. That’s what I need to show to get promoted.”

Performance incentive: “My bonus is tied to reducing customer churn. If your platform helps us retain 5% more customers, that’s real money in my pocket.”

Problem solved: “I’ve been fighting with our legacy system for three years. Everyone knows it’s a mess. If I can replace it and prove it was the right call, that’s a huge win for my credibility.”

Risk reduced: “If this project fails, I’m the one who’s going to take the blame. I need to know you can deliver because my job’s on the line.”

Boss impressed: “My VP has been pushing me to find a better solution for months. If I bring this to her and it works, she’ll see me as someone who can solve big problems.”

Notice what all of these have in common: They’re specific. They’re personal. And they’re emotional.

That’s what you’re looking for. Not “yeah, this seems like it could help the company.” That’s generic. That won’t sustain them through the hard parts of championing your solution.

You want: “If this works, here’s specifically how my life gets better.”

Once you understand their personal win, everything changes. You can tailor your conversations to reinforce it. You can help them articulate it to others. You can remind them of it when they start to waver.

And here's the uncomfortable truth: If you can't identify their personal win, they might not have one. Which means they're not really your Ambassador. They're just a contact who's being nice.

How to Identify Your Ambassador (And Avoid the Pretenders)

Let's talk about how you actually find your Ambassador. Because it's not always obvious, and if you pick wrong, you'll waste months selling to someone who can't help you.

Look for Influence and Enthusiasm

Your Ambassador needs two things: influence within the company and genuine enthusiasm for your solution.

Influence means they have relationships with decision makers, they're respected for their opinion, and they understand how things get done. They don't necessarily need a big title—sometimes the best Ambassadors are senior individual contributors or middle managers who have the trust of executives.

Enthusiasm means they see the value in what you're offering and they want it to succeed. Not fake enthusiasm—"yeah, this is cool." Real enthusiasm—"we need to make this happen."

Look at the org chart. Look at who gets invited to important meetings. Ask: "Who do people go to when they need to get something done?"

Cultivate Multiple Contacts

Here’s a mistake I see all the time: A salesperson finds one friendly person and puts all their eggs in that basket.

Don’t do that.

Build relationships with multiple people in the account. The more people you know, the better your chances of finding someone who has both the influence and the motivation to be a true Ambassador.

Plus, sometimes the person you think is your Ambassador isn’t actually the right person. Maybe they don’t have as much influence as you thought. Maybe they’re supportive but not willing to stick their neck out. If you’ve only got one contact, you’re stuck. If you’ve got three or four, you’ve got options.

Observe Their Commitment

An Ambassador doesn’t just say yes. They show up for you.

What does that look like?

They organize meetings with other stakeholders.

They forward you relevant emails or documents.

They tell you things you wouldn’t otherwise know.

They give you feedback on your proposal before you present it.

They coach you on how to position things internally.

If someone says they’re supportive but never actually does anything? They’re not your Ambassador. They’re being polite.

Listen to Their Language

Pay attention to the words they use.

Ambassador language: “We need to solve this.” “Let me set up a meeting with the team.” “I’ll talk to the CFO about this.” “What do you need from me to make this happen?”

Non-Ambassador language: “This is interesting.” “I’ll keep you posted.” “Let me think about it.” “I’ll see what I can do.”

If they’re using “we” instead of “I,” that’s a good sign. If they’re talking about next steps and action, that’s a good sign. If they’re being vague and non-committal? They’re not your Ambassador.

Seek the Personal Win

We already talked about this, but it’s worth repeating: If they can’t articulate their personal win, they’re not committed.

Don’t assume you know what it is. Ask. Directly.

“Tell me—how does solving this problem help you personally?”

“If we can get this done, what does that mean for your goals this year?”

“What’s at stake for you if this doesn’t work out?”

If they give you a vague answer or pivot to corporate benefits, dig deeper. You need to know what they get out of it.

Warning: Avoid the False Ambassador

Here’s the trap: Someone is friendly, enthusiastic, and responsive—so you assume they’re your Ambassador. Then you find out they don’t actually have any influence. Or they’re not willing to take any risk. Or they ghosted you the moment things got complicated.

Signs of a False Ambassador:

They can't introduce you to other stakeholders.

They don't know the Decision Maker well enough to vouch for you.

They go silent when you ask for help navigating internal politics.

They're enthusiastic in meetings with you but do nothing when you're not there.

The brutal truth: If they can't or won't move you forward, they're not an Ambassador. They're a dead end. And the sooner you figure that out, the sooner you can find someone who can actually help you.

Questions to Ask Your Ambassador

Alright. You've identified someone who could be your Ambassador. Now what?

You need to have conversations that do three things: (1) Confirm they have the influence and access you need, (2) Uncover their personal win, (3) Equip them with the information they need to sell internally.

Here are the questions that matter. Use these scripts. Adapt them to your style. But ask them.

To Understand Their Personal Win

"Tell me about your personal aspirations and what motivates you in this project. How do you envision our solution helping you achieve those goals?"

Listen for specifics. If they say "it'll help the company," push: "Sure, but how does it help you? What changes for you personally if this works?"

“If we can get this done by Q3, what does that enable you to do next?”

This gets them thinking about how your solution unlocks something for them—not just solves today’s problem.

To Understand the Landscape

“In addition to you, who else needs to be involved in this decision?”

Notice the phrasing. “In addition to you” assumes they’re already involved. You’re not asking if they matter—you’re asking who else matters.

“Walk me through the last time your company made a purchase like this. What did that process look like?”

This tells you how decisions actually get made, not how they’re supposed to get made.

“Who do people go to when they need to get something approved around here?”

This identifies the real influencers—which might not be the people with the biggest titles.

To Test Their Commitment

“If you had to present this to [Decision Maker] without me in the room, what would you say?”

This forces them to articulate your value proposition. If they can’t do it, they’re not ready to advocate for you.

“What concerns do you think [Decision Maker] will have about this?”

If they say “I don’t know,” they don’t know the Decision Maker well enough to be your Ambassador. If they give you specific concerns, they're thinking like an insider—which is exactly what you need.

"What do you need from me to help you make the case internally?"

This is your chance to equip them. Maybe it's a one-pager. Maybe it's a ROI calculator. Maybe it's a 10-minute call with your CTO. Give them the tools they need to sell for you.

To Uncover Risk

"What could go wrong here? What would cause this to stall or fall apart?"

A real Ambassador will tell you the truth. A fake Ambassador will say "nothing, we're good."

"Who internally might push back on this, and why?"

You need to know where resistance is coming from so you can address it proactively.

How to Strengthen a Weak Ambassador Score

You've scored your opportunity. Let's say you're at a 1. Or maybe a 0. What do you do?

Here's the playbook:

From 0 to 1: Find the Person Who Benefits Most

If you don't have an Ambassador at all, you need to figure out who stands to gain from your solution succeeding.

Look at the org chart. Look at who owns the problem you're solving. Look at who's being held accountable for results in this area.

Then reach out. Build the relationship. Have the "personal win" conversation.

From 1 to 2: Get Commitment

You've got someone identified. Now you need to move them from "supportive" to "committed."

Step 1: Have the personal win conversation. Use the questions above. Understand what's in it for them.

Step 2: Ask for their commitment. Don't assume. Make it explicit.

"Based on everything we've talked about, I'd love to have you as an advocate for this internally. Are you comfortable championing this solution with your team?"

If they say yes—great. If they hesitate—find out why.

From 2 to 3: Get the Introduction

You've got someone who's committed. Now you need them to connect you with the Decision Maker.

Step 1: Equip them with tools. Give them a one-pager, a business case, a presentation—whatever they need to make your case without you.

Step 2: Ask for the introduction.

"I'd love to meet [Decision Maker] to validate a few things. Can you make that introduction?"

If they say "not yet"—ask why. What needs to happen first? What are they waiting for?

Step 3: Make it easy for them. Offer to draft the email. Suggest times. Take the work off their plate.

When Things Go Sideways: Recovery Moves

When they won't introduce you to the Decision Maker:

You: "I understand. Can you help me understand what needs to happen first before we can involve [Decision Maker]?"

If they're vague or keep delaying → They're not your Ambassador. Score = 1, not 2.

When they can't articulate your differentiation:

You: "If you had to explain to your CFO why we're different in 30 seconds, what would you say?"

If they struggle → Stop. Equip them. Build the Needs Brief together.

When they suddenly go quiet after being engaged:

You: "Hey [Name], I noticed our communication dropped off. Did something change? Is this still a priority?"

Listen carefully. You might have competition. You might have lost the Decision Maker's support. You might be deprioritized.

The Needs Brief Tool

Let me tell you about a tool that's transformed how we help Ambassadors sell internally.

It's called the Needs Brief. And it's essentially a collaborative business case that you build with your Ambassador.

Here's why it works:

When your Ambassador goes to present your solution without you, they're going to be asked questions. Tough questions. "Why this vendor?" "Why now?" "What's the ROI?" "What are the risks?"

If they don't have good answers, your deal is in trouble.

The Needs Brief gives them those answers. But more than that—it frames the conversation the way you want it framed. It positions your solution as the obvious choice. And because they helped create it, they own it. They're not reading from your script—they're presenting their own analysis.

What's in a Needs Brief:

Problem Statement: What's the issue they're trying to solve?

Impact: What's the cost of not solving it?

Strategic Alignment: How does this connect to company goals?

Proposed Solution: Your offering (obviously).

ROI Analysis: What's the financial return?

Risk Mitigation: What are the concerns and how are they addressed?

Next Steps: What needs to happen to move forward?

You don't create this in a vacuum. You build it with your Ambassador. You interview them. You use their words. You let them shape it.

Then you hand them a polished document they can present to their boss, their CFO, their executive team—whoever needs to see it.

Why it works: They present your solution the way you want it presented. And because it's in their voice, using their company's language, addressing their specific concerns—it doesn't feel like a vendor pitch. It feels like an internal recommendation.

You can download the Needs Brief template at revheat.com/book.

Real Story: The PremiumSaaS Mistake

Let me tell you about a company that learned this lesson the hard way.

PremiumSaaS was a leading software solutions provider working on what looked like a great opportunity with TopProspect, a significant player in their industry.

Early in the sales process, they met Alex, a department head. Alex was enthusiastic. He loved the solution. He attended every demo. He responded to every email. He told them, "This is exactly what we need."

PremiumSaaS thought they'd found their champion. They invested months working with Alex—customizing proposals, building out implementation plans, addressing every concern he raised.

Then they got the call: They'd lost. TopProspect went with a competitor.

What went wrong?

PremiumSaaS made a classic mistake: They assumed Alex was the Decision Maker.

He wasn't.

The actual Decision Maker was Rebecca, the CFO. And PremiumSaaS never met her.

Alex did his best. He genuinely tried to sell the solution internally. But he didn't have the right relationships. He didn't know how to speak Rebecca's language—financial impact, risk mitigation, strategic alignment. He couldn't answer her questions with the depth and specificity she needed.

And because PremiumSaaS had never engaged with Rebecca directly, they couldn't help him.

The lesson: Enthusiasm doesn't equal influence. A friendly contact isn't necessarily an Ambassador. And even a real Ambassador needs the right tools and the right access to be effective.

If PremiumSaaS had used the O2C scoring system, they would have seen it:

Ambassador Score: 2 at best. Alex was supportive but hadn't taken them to the Decision Maker.

Decision Maker Score: 0. They'd never validated anything with Rebecca.

Those scores would have told them exactly what to do: Get a meeting with Rebecca. Validate priorities and budget with her. Equip Alex to sell to her in language she cares about.

Instead, they assumed everything was fine. And they lost.

Don't be PremiumSaaS.

Action Items

You've read the chapter. Now do the work.

This week:

1. Score your top 5 opportunities on Ambassador (0-3). Be honest. Use the criteria. Don’t inflate.
2. For any opportunity below a 2: Schedule a call to have the “personal win” conversation. Use the questions in this chapter. Find out what’s in it for them.
3. For any opportunity at a 2: Ask for the Decision Maker introduction. This week. Don’t wait. If you’re at a 2 and you don’t ask, you’re choosing to stay stuck.
4. For any opportunity at a 3: Make sure your Ambassador has the tools they need. Build the Needs Brief with them. Equip them to sell when you’re not there.

And remember: If you don’t have an Ambassador, you don’t have a deal. You have a hope. And hope doesn’t close deals.

Now go find your inside advocate.

Next up: Chapter 4—Engaging with the Decision Maker. Because even the best Ambassador can only take you so far. Eventually, you need to talk to the person who can actually say yes.

CHAPTER 4

Engaging with the Decision Maker

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The $4 Million Mistake

Let me tell you about Alex and Rebecca.

A software company—we'll call them PremiumSaaS—was working on what they thought was their biggest deal of the year. During the sales process, they connected with Alex, a department head who was enthusiastic about their solution. Alex attended every demo. Alex responded to emails within hours. Alex said things like "this is exactly what we need" and "I'm going to make this happen."

The PremiumSaaS team was thrilled. They had a champion. They had momentum. They were forecasting this as a commit.

Months went by. Proposals were sent. Pricing was negotiated. Legal reviewed contracts. Everything seemed to be moving forward. The sales rep was already calculating commission.

Then they got the call: They lost. The prospect went with a competitor.

What happened?

Alex did his best. He really did. He presented to the executive team. He explained the features. He advocated for PremiumSaaS as strongly as he could. But the actual Decision Maker—Rebecca, the CFO—had questions Alex couldn’t answer. She wanted to understand the financial impact, the implementation risks, the total cost of ownership. Alex fumbled. He defaulted to talking about features instead of business outcomes. He couldn’t speak Rebecca’s language because no one from PremiumSaaS had ever taught him how.

PremiumSaaS never even met Rebecca. They sold to the wrong person.

Four million dollars. Gone. Because they confused enthusiasm for authority.

Here’s the brutal truth: Loving your solution doesn’t mean someone can buy it.

This chapter is about making sure you never make that mistake.

Decision Maker ≠ Ambassador

Let’s get this straight right now because confusion on this point kills deals every single day.

Chapter 3 was about your Ambassador—the person inside the account who actively works on your behalf, who sells for you when you’re not in the room, who has a personal stake in your success.

This chapter is about the Decision Maker—the person who holds the purse strings. The person who can actually say yes.

These are often not the same person.

Your Ambassador can love you. They can champion you. They can fight for you. But if the Decision Maker doesn't know you exist, you're not closing.

Here's the distinction:

The Ambassador influences. The Decision Maker decides.

The Ambassador advocates. The Decision Maker allocates budget.

The Ambassador wants you to win. The Decision Maker needs to justify the investment.

In the PremiumSaaS story, Alex was the Ambassador. Rebecca was the Decision Maker. PremiumSaaS got one but missed the other. And that's how you lose four million dollars.

Here's what you need to understand: In most B2B deals, 6 to 10 people influence the decision. That's not a typo. Six to ten. You've got department heads, technical evaluators, procurement, legal, finance, executive sponsors, end users. All with different priorities. All with different concerns.

Your job isn't to convince all of them—though you might need to engage with many of them. Your job is to identify who ultimately makes the call and validate three specific things with that person.

Let me show you how.

The Scoring System (0-3)

Just like every other category in O2C, Decision Maker engagement gets scored from 0 to 3. The score tells you where you actually stand—not where you hope you stand.

Here's what each score means:

Score 0: No Information

You have no idea who the Decision Maker is. You might be emailing into the void. You might be talking to someone three levels removed from authority. You don't know, and you haven't tried to find out.

What it looks like: "I think it's the VP of Engineering… or maybe the CTO? I'm not sure."

Score 1: Identified But Not Validated

You've figured out who the Decision Maker is, but you haven't actually engaged with them. You haven't validated business priorities. You haven't confirmed funding or project priority. Maybe you met them once in a big group meeting, but you've never had a real conversation.

What it looks like: "We've met, but we haven't discussed budget yet. I'm working through my contact first."

Score 2: Met and Validated Priorities

You've had a real conversation with the Decision Maker. You've validated that this initiative matters to them. But you haven't confirmed funding or compelling event. You know it's important, but you don't know if it's funded or when they need to act.

What it looks like: "The CFO confirmed this is a priority for them, but we haven't nailed down the timeline or budget approval yet."

Score 3: Funding, Priority, and Compelling Event Validated

You've locked it in. The Decision Maker has confirmed they have budget allocated or approved. You've validated this is a priority—not just "nice to have," but something that matters for their goals this quarter or this year. And critically, you've identified a compelling event—a reason they need to decide by a specific date.

What it looks like: "They have $500K allocated in Q2 budget, this is their #2 initiative for the year, and they need it implemented before their annual user conference in September."

Most salespeople think they're at a 2 when they're really at a 1. Some think they're at a 3 when they're at a 2. The difference costs deals.

Here's my rule: If you can't articulate the Decision Maker's name, their budget status, their priorities, and their compelling event without using the words "I think" or "probably"—you're not at a 3.

The Three Things You Must Validate

To get to a Score 3, you need to validate three specific things with the Decision Maker. Not assume. Not hope. Validate.

1. Funding

Do they have budget allocated for this? Not "we should be able to find the money." Not "it's in the plan." Allocated. Approved. Real.

Here's what you need to know:

How much budget is allocated?

Has it been formally approved, or is approval still pending?

When does the budget become available?

Who controls the budget?

What other initiatives are competing for the same dollars?

If they say "we'll find the budget," that's not validation. That's hope. And hope isn't a strategy.

2. Priority

Where does this initiative rank among everything else they're trying to accomplish? If it's their number one priority, great. If it's number three, that's still viable. If it's number eight… you've got a problem.

Here's what you need to know:

What are their top three priorities for this quarter or year?

Where does this initiative fall on that list?

What could cause this to get deprioritized?

Who else internally might push back or compete for resources?

If they say "this is important to us," push for specifics. Important compared to what? Important enough to do this quarter, or important enough to think about someday?

3. Compelling Event

This is the big one. Why do they need to decide by a specific date? What's driving the timeline?

A compelling event is not "we want to get this done soon." A compelling event is:

A product launch that requires this to be in place

A contract expiration that creates urgency

A board meeting where they need to show progress

A compliance deadline they have to meet

A seasonal business cycle (retail before holidays, tax prep before April)

An executive mandate with a date attached

Without a compelling event, there's no urgency. Without urgency, deals slip. They don't die—they just move to next quarter. Then next quarter. Then next year.

The Decision Maker who loves your solution but has no compelling event will push you. Every time. Because doing nothing is easier than doing something.

How to Get to the Decision Maker

Okay, you know what you need to validate. But how do you actually get face time with the person who matters?

There are three main paths:

Path 1: Through Your Ambassador (Best Option)

This is the ideal scenario. Your Ambassador—the person from Chapter 3 who's actively working on your behalf—introduces you to the Decision Maker. This comes with built-in credibility because the Ambassador is vouching for you.

Here's what to say: "Based on everything we've discussed, it sounds like this aligns with your goals. To make sure we're building the right solution, I'd love to get 15 minutes with [Decision Maker] to validate priorities and timeline. Can you make that introduction?”

If your Ambassador hesitates or resists, that’s valuable information. It tells you they might not have as much influence as you thought—or they’re not as committed to your success.

Path 2: Through Research (When You Have To)

Sometimes you can’t rely on an internal champion to make the introduction. In that case, you do the research yourself.

Use LinkedIn Sales Navigator to map the org chart

Check annual reports, press releases, or company announcements for who holds budget authority

Look for who gets quoted in news articles or speaks at industry events

Ask your existing contact directly: “Who ultimately needs to approve an investment like this?”

Path 3: The Direct Ask (Use Carefully)

In some situations, you can ask to meet with the Decision Maker directly—but you need to frame it correctly. You’re not going around your contact. You’re helping them succeed.

Here’s the frame: “To make sure I’m building a proposal that addresses the right priorities, I typically like to spend 15 minutes with the person who’ll be signing off on this. It helps me make sure we’re aligned on outcomes, timeline, and success metrics. Who should I be talking to?”

Notice what you're not saying: You're not saying "I need to talk to your boss" or "I need the real decision maker." You're positioning it as serving their interests.

Questions to Ask the Decision Maker

Alright, you've got the meeting. Now what?

Here are the specific questions you need to ask to validate funding, priority, and compelling event:

To Validate Priority:

"Where does this initiative rank among your priorities for [this quarter / this year]?"

"If you had to pick your top three goals right now, where does this fit?"

"What happens if this doesn't get solved this year?"

"What other initiatives are you balancing against this one?"

What you're listening for: Do they name it in their top three? Do they describe it as urgent or just "nice to have"? Do they talk about it in terms of strategic impact or just tactical improvements?

To Validate Funding:

"Has budget been allocated for this, or is that part of what we need to figure out?"

"What's the approval process for an investment of this size?"

"Are there other projects competing for the same budget?"

“When does budget get finalized for this fiscal year / quarter?”

What you’re listening for: Have they actually set aside money, or are they hoping to find it later? Is the budget approved, or does it still need to go through finance or executive review?

To Find the Compelling Event:

“What’s driving the timeline on this?”

“Is there a specific date or event this needs to be in place for?”

“What happens if this decision takes longer than expected?”

“Are there any upcoming deadlines—internal or external—that we should be aware of?”

What you’re listening for: Is there a real date-driven reason to act, or is the timeline arbitrary? Will something bad happen if they don’t decide soon?

The ROI Conversation: Let Them Do the Math

Here’s where most salespeople screw up: They calculate ROI for the prospect.

They say things like “Based on our analysis, you’ll see a 300% return in 18 months” or “This will save you $2 million over three years.”

The prospect hears this and thinks: “Sure you will. That’s what every salesperson says.”

Here's the better way: Guide them to calculate the ROI themselves. When they do the math, they own it. And when they own it, they defend it.

Here's the framework:

Step 1: "What does your average [customer / transaction / deal] generate for you right now?"

Step 2: "What's your goal for improvement? What would success look like?"

Step 3: "How did you come up with that goal? What makes you confident it's achievable?"

Step 4: "Based on current volumes, what would that improvement translate to in actual revenue or cost savings?"

Step 5: "Over what time frame are you measuring that?"

Step 6: "So if I'm hearing you right, you're expecting [their number] in [their time frame]—is that accurate?"

Notice what just happened: They told you the numbers. They told you the timeline. They told you what success looks like. And when you summarize it back to them, they say "exactly."

Now when they go to defend this internally—to their CFO, their board, their team—they're not defending your ROI calculation. They're defending their own.

Your beliefs are met with skepticism. Their beliefs feel true.

When There Are Multiple Decision Makers

In many B2B deals, especially larger ones, there isn't just one Decision Maker. There's a Decision Making Unit—a group of people who all need to sign off.

You might have:

The Economic Decision Maker (controls the budget)

The Technical Decision Maker (approves the solution from a technical standpoint)

The End User Decision Maker (will actually use the product)

Procurement (negotiates terms and contracts)

Legal (reviews and approves contracts)

Here’s what you need to understand: Everyone in this group has veto power. Not everyone has approval power.

That means one “no” can kill the deal. But you need multiple “yeses” to close it.

So how do you manage this?

1. Map the Decision Making Unit Early

Don’t wait until you’re deep in the sales process to find out there are six people involved. Ask your Ambassador: “Walk me through the typical decision process for something like this. Who gets involved? What’s the sequence?”

2. Understand Each Person’s Priorities

The CFO cares about ROI and risk. The CTO cares about integration and technical fit. The end users care about ease of use. Procurement cares about price and terms. Tailor your message for each stakeholder.

3. Engage Them Individually When Possible

Group meetings are necessary, but they're not sufficient. You need one-on-one time with each key stakeholder to understand their specific concerns and build rapport. If your Champion or Ambassador can facilitate these introductions, even better.

4. Address Objections Before They Become Blockers

If you know the CTO is skeptical about integration, don't wait for them to raise it in the final meeting. Proactively address it. Bring in your technical team. Show proof points. Get ahead of the objection before it becomes a reason to say no.

Common Mistakes (And How to Avoid Them)

Let me save you some pain. Here are the five most common mistakes I see with Decision Maker engagement:

Mistake 1: Assuming Your Ambassador Is the Decision Maker

This is the PremiumSaaS mistake. Just because someone loves your solution doesn't mean they can buy it. Always ask: "In addition to you, who else will be involved in making this decision?"

Mistake 2: Avoiding the Funding Conversation Because It Feels Uncomfortable

I get it. Talking about money is awkward. But avoiding it doesn’t make the budget appear. It just means you find out too late that there isn’t one. Ask early. Ask directly.

Mistake 3: Accepting “We’ll Find the Budget” Without Validation

When someone says they’ll find the budget, what they mean is: “I hope we can find the budget, but I haven’t actually checked.” That’s not good enough. Follow up: “Walk me through what that process looks like. Who needs to approve it? When does that typically happen?”

Mistake 4: Not Asking About Competing Priorities

Every company has more initiatives than they have time or budget to execute. If you don’t know what else is competing for resources, you can’t position your opportunity as the one that matters most.

Mistake 5: Confusing Interest with Commitment

A Decision Maker saying “this looks interesting” is not the same as “this is a priority and we’re moving forward.” Push for clarity. Ask what the next step is. Ask what success looks like. Ask when they need to decide.

A Real Story: How Validation Changed Everything

Let me tell you about a deal we saved.

We were working with a data analytics company—let's call them DataCorp. They were pursuing a $2 million deal with a financial services firm. The sales rep, Sarah, had been working the opportunity for four months. She had a great relationship with the VP of Marketing, who loved the solution. She thought she was at a Score 3.

I asked her: "Have you validated funding with the CFO?"

She said, "Well, the VP of Marketing says they have budget."

I said, "That's not validation. That's what your Ambassador thinks. What does the CFO say?"

She admitted she'd never spoken to the CFO.

We scheduled a meeting. In that meeting, we found out three critical things:

First, the CFO had budget allocated—but it was for a different initiative. The VP of Marketing was hoping to reallocate it.

Second, this project was competing with two other priorities, and the CFO wasn't convinced it was more important.

Third, the board was meeting in six weeks, and the CFO needed to show progress on cost reduction initiatives. That was the compelling event.

Armed with that information, we adjusted the proposal. We reframed the ROI conversation around cost reduction rather than revenue growth. We positioned the project as a way for the CFO to show immediate wins to the board. We built the business case around their compelling event.

The deal closed three weeks later. Score 3. Funding validated. Priority confirmed. Compelling event locked in.

If we hadn't had that conversation with the CFO, Sarah would have kept selling to the VP of Marketing, hoping the deal would close on enthusiasm alone. It wouldn't have. The CFO would have said no, and Sarah would have been shocked.

That's the difference between a Score 1 and a Score 3.

Action Items: What to Do This Week

Alright, here's what I want you to do right now—not next week, not when you "have time," but this week:

1. Score Your Current Opportunities on Decision Maker (0-3)

Go through your top 5 opportunities. For each one, honestly score where you are: 0 if you don't know who the Decision Maker is; 1 if identified but haven't engaged; 2 if met and validated priorities, but funding/compelling event unclear; 3 if validated funding, priority, and compelling event. Be honest. Not hopeful.

2. For Any Opportunity Below a 2, Schedule a Meeting with the Decision Maker

Don't wait. Don't assume your Ambassador will handle it. Get face time with the actual Decision Maker. If your Ambassador resists introducing you, that's valuable information—it tells you they're not as strong a champion as you thought.

3. For Any Opportunity at a 2, Have the Funding and Compelling Event Conversation

Ask the three critical questions: Has budget been allocated? Where does this rank on your priority list? What's driving the timeline on this? If you get vague answers, dig deeper.

4. Practice the ROI Conversation

On your next call with a Decision Maker, guide them through articulating the value in their own words. Don't calculate ROI for them—help them calculate it themselves. The more they own the math, the more committed they'll be to defending it internally.

Alright. Next chapter, we're going deep on Business Motivation—how to uncover the real reason they need to act, how to connect tactical pain to strategic priorities, and how to use that to close.

Chapter 5 is where we stop talking about who's involved and start talking about why it matters.

Let's go.

CHAPTER 5

Establishing Business Needs and Motivation

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Here's the deal: decision makers today have more information at their fingertips than at any point in history. They can Google your product. They can read reviews. They can watch demos on YouTube. They can download comparison guides. They can ask ChatGPT to analyze your pricing.

So why do they still buy the wrong thing?

Because they think they know what they need. And they're often wrong.

Have you ever had a prospect who knew exactly what they needed—then bought something completely different after a few conversations? Maybe they came to you asking for a reporting tool and walked away with a complete data transformation platform. Or they wanted "better email deliverability" and ended up rebuilding their entire go-to-market strategy.

It's not because you bait-and-switched them. It's because your job isn't to give prospects what they ask for. Your job is to help them see the real problem.

That's what Business Motivation is all about. It's the difference between tactical problems and strategic priorities.

Between "we need to fix this" and "if we don't fix this, we can't achieve that, which means this other thing happens."

Most salespeople stop at the tactical level. They hear the problem, they pitch the solution, they write up the proposal. Then they wonder why the deal dies in legal review six months later.

Let me tell you why that happens. It's because you never connected the dots to what actually matters. You sold them on fixing the tactical pain without ever making them articulate why that pain matters to their business, their role, their bonus, their reputation, their ability to sleep at night.

What Stopping at Tactical Looks Like:

Prospect: "Our email deliverability is terrible. We're only hitting 60% inbox rate."

Bad Salesperson: "Perfect! Our platform can get you to 95% inbox rate. Let me show you how it works..." [Proceeds to demo for 45 minutes]

Three months later, the deal is stuck in "legal review" with no movement. Why? Because the salesperson never asked why inbox rate matters. They assumed fixing the problem was enough. It's not.

What Good Looks Like:

Prospect: "Our email deliverability is terrible. We're only hitting 60% inbox rate."

Good Salesperson: "60% is rough. Help me understand—what's the business impact of that over the next 12 months?"

Prospect: "We're launching three new product lines this year. Email is our primary customer acquisition channel. At

60% deliverability, we're losing 40% of our potential reach. That directly impacts our ability to hit our $50M revenue target."

Good Salesperson: "What happens if you're still at 60% deliverability when you launch the new products?"

Prospect: "We miss our launch targets. The board is expecting 30% of our growth to come from these new lines. If we can't reach our audience, we don't hit the number. And if we don't hit the number… let's just say there will be consequences."

See the difference? Same tactical problem (email deliverability). But the second salesperson connected it to strategic priority ($50M target), timeline (product launches this year), and consequences (board expectations, career risk). That deal doesn't get stuck in legal review. That deal has urgency.

40-60% of deals are lost to "no decision." Not to your competitor. To nothing. The prospect decides that keeping things the way they are is easier than choosing you. That's not a competitor problem. That's a Business Motivation problem.

This chapter is going to show you how to move a prospect's eyes up off the desk, away from today's fire, and toward the 6, 12, 18-month strategic priority that makes solving the tactical problem urgent.

The Scoring System (0-3)

Business Motivation scores from 0 to 3. Here's what each score means in real life:

Score 0: No information on pain points or needs.

This is where most deals start. The prospect says “I’m interested” or “this looks great” or “send me some information.” You have enthusiasm but no substance. You don’t know what they’re trying to solve, why it matters, or who cares.

If you’re still at a 0 after two conversations, you don’t have a deal. You have a tire-kicker.

Score 1: Known need, but small and tactical.

“We need to fix our email deliverability.” “We need better reporting.” “We need to automate this manual process.”

These are real problems. But they’re not strategic. They haven’t told you why it matters to the business. They haven’t connected it to a goal, a deadline, a consequence. You’re still at the level of “nice to have” instead of “need to have.”

Most salespeople camp out here. They hear a tactical problem, they demo a tactical solution, they write a tactical proposal. Then they’re shocked when the deal gets deprioritized or lost to “no decision.”

Score 2: Ambassador connects need to 12+ month strategic priority, not validated by Decision Maker.

Now you’re getting somewhere. Your Ambassador has said something like: “If we don’t fix our email deliverability, we can’t execute our expansion strategy, which means we miss our Q4 revenue targets.”

This is good. You’ve moved from tactical to strategic. You understand how solving the small problem unlocks the big goal.

But—and this is critical—you haven't validated this with the Decision Maker yet. Your Ambassador might be right. Or they might be making assumptions. Or they might be overstating the urgency to get you excited. You don't know until you hear it from the person who holds the purse strings.

Score 3: Pain and priorities validated by Decision Maker, agreed as urgent and important.

This is the score you're chasing. The Decision Maker has confirmed: "Yes, fixing email deliverability is tied to our expansion goals. Yes, it's one of our top three priorities for the year. Yes, if we don't solve this by Q3, we're in trouble."

At a 3, you have alignment. The Decision Maker knows what needs to be solved, why it matters, when it matters, and what happens if they don't act. Your deal has momentum because the business need is clear and urgent.

Without a 3, you're vulnerable. To budget cuts. To shifting priorities. To "we'll revisit this next quarter." With a 3, you've got a fighting chance.

What a Score 1 Conversation Sounds Like:

Salesperson: "So what brings you to our website?"

Prospect: "We're looking for better reporting tools. Our current setup is pretty manual."

Salesperson: "Great! Let me show you how our reporting module works..."

Stop. That salesperson just jumped to demo mode without understanding anything. They know there's a tactical problem (manual reporting) but they have no idea why it matters, what it costs, or whether anyone with budget actually cares.

What a Score 3 Conversation Sounds Like:

Salesperson: “You mentioned manual reporting is slowing you down. Help me understand—what’s the impact of that on your business over the next 12 months?”

Prospect: “Well, we’re trying to scale our sales team from 10 reps to 30 by Q4. But right now, our VP of Sales spends 10 hours a week pulling reports manually. As we add more reps, that’s going to become impossible.”

Salesperson: “What happens to your Q4 scaling plan if she’s still spending 10 hours a week on manual reporting?”

Prospect: “We can’t scale. The board expects us to hit $15M by end of year, and we need those 30 reps to get there. If we don’t have visibility into pipeline and performance, we’re flying blind. This is one of our top three priorities.”

Salesperson: “Have you validated this priority with your CFO?”

Prospect: “Yes. She’s the one who told me to find a solution. She said if we don’t fix this by Q2, we need to either delay the hiring plan or accept that we won’t have the data we need to manage the team.”

That’s a 3. The salesperson connected tactical pain (manual reporting) to strategic priority (scaling to hit $15M). They validated with the Decision Maker (CFO). They established consequences (delay hiring or fly blind). They got a timeline (Q2).

Tactical vs. Strategic: The Key Distinction

Most deals die because salespeople never make the jump from tactical to strategic. Let me show you what I mean.

Tactical: "We need to fix X."

Strategic: "If we don't fix X, we can't achieve Y, which means Z happens."

Your job is to move their eyes up off the desk, away from daily concerns, to 6, 12, 18 months out. That's where the real urgency lives.

Here's an example:

Tactical: "We need better reporting."

Strategic: "Without better reporting, we can't identify which products are profitable, which means we'll keep investing in losers and miss our margin targets for 2025. If we miss margin targets, we don't hit board expectations. If we don't hit board expectations, my job is at risk."

See the difference?

The first version is a feature request. The second version is a business imperative tied to consequences that matter to the Decision Maker personally.

Most prospects won't make this jump on their own. They're too close to the problem. They see the broken thing right in front of them—the bad report, the slow process, the manual workflow—and they think fixing that thing is the goal.

It's not. Fixing the thing is only valuable if it unlocks something bigger. Your job is to help them see what that bigger thing is.

The Time Boxing Technique

Here's a simple trick that forces prospects to think strategically instead of tactically: add a timeframe to every open-ended question.

Instead of: "What are your biggest challenges?"

Ask: “What are the biggest challenges you need to solve over the next 12 months?”

That one word—“12 months”—changes everything. It forces them to think beyond today’s fire. It makes them consider strategic goals, not just tactical headaches.

Try it on your next discovery call. Watch how the conversation shifts. Instead of getting a list of immediate annoyances, you’ll get insight into what they’re actually trying to achieve.

Other time boxing variations:

“What needs to be in place 6 months from now for you to consider this year a success?”

“If we’re sitting here 18 months from now and things haven’t changed, what does that cost you?”

“What’s the goal for this quarter that depends on fixing this issue?”

Time boxing does two things: it surfaces strategic priorities, and it creates urgency. Both of which you need to move from a 1 to a 3.

Questions to Uncover Business Motivation

Let me give you the actual questions that work. Not generic discovery questions. The specific prompts that get prospects to reveal their real motivation.

To understand the tactical problem:

“What’s the specific issue you’re trying to solve?”

“How long has this been a problem?”

“What have you tried before? What worked? What didn’t?”

To connect to strategic priority:

"If you solve this, what does that enable you to do next?"

"How does this connect to your goals for the next 12 months?"

"What happens to [bigger initiative] if this doesn't get fixed?"

To establish urgency:

"What's the cost of not solving this—in dollars, time, or risk?"

"What happens if you're still dealing with this problem in 6 months?"

"Who else is affected by this? What does it cost them?"

Notice what all these questions have in common: they make the prospect talk. They make the prospect connect the dots. They make the prospect articulate why this matters.

Because here's the truth: it's more important for the prospect to hear themselves say it than for us to tell them.

If you're the one making the case for urgency, it sounds like sales pressure. If they're the one saying "we need this by Q3 or we're in trouble," that's conviction.

What Bad Questions Look Like:

Here are the questions that keep you stuck at a 1:

"What are you looking for in a solution?" (Too broad. You'll get feature requests, not strategic priorities.)

"How can we help you?" (Puts the burden on them to figure out what you do. That's your job, not theirs.)

“What’s your budget for this?” (Before you understand the problem? You’re telegraphing that you’re just trying to qualify them, not help them.)

“What’s your timeline?” (Without context, this is useless. You need to know what’s driving the timeline, not just when they want to buy.)

“Who else are you looking at?” (This focuses the conversation on competitors instead of on their business problem. Wrong place to start.)

These questions aren’t terrible. They’re just surface-level. They get you information, but not insight. They keep you at the tactical level when you need to be strategic.

The Danger of “Happy Ears”

Let me warn you about the biggest trap in sales: Happy Ears.

Happy Ears is when you believe the prospect without exercising healthy skepticism. They say “this looks great” and you hear “we’re definitely buying.” They mention budget might be tight but they “should be able to work something out” and you hear “we have the money.” They tell you they need to “run it by a few people” and you assume that’s a formality.

Happy Ears will kill your pipeline faster than any competitor ever could.

Here are the warning signs that you’ve got Happy Ears on a Business Motivation score:

You’re using “I think” and “sort of” language when describing the opportunity. “I think this is important to them.” “It sort of ties to their growth goals.”

You can't quantify the impact in their words. You can tell me what your solution does, but you can't tell me what they said about why it matters.

You haven't heard them say why this is urgent. You're inferring urgency from context clues instead of validation.

If you catch yourself in any of these patterns, you don't have a 2 or a 3. You have a 1 with wishful thinking.

Go back and ask better questions. Make them articulate the strategic priority. Make them explain the consequences. Make them give you the timeline.

Because the loudest voice in your head is always your own. And if you're the one making up the story about why this deal matters, you're in trouble.

What Happy Ears Sounds Like:

Sales Manager: "Tell me about the ABC Corp deal. What's their business motivation?"

Sales Rep: "They said this is really important to them. They're super excited about what we can do."

Sales Manager: "Okay, but what specifically makes it important? How does it connect to their Q3 goals?"

Sales Rep: "Well, not specifically, but you could tell they were really engaged in the demo. They asked a lot of questions."

Sales Manager: "What's the consequence if they don't solve this?"

Sales Rep: "I mean, they wouldn't be talking to us if it wasn't urgent, right?"

That's not a 2. That's a 1 with wishful thinking. The rep is inferring urgency instead of validating it. They're confusing engagement with commitment. They're assuming importance instead of confirming it.

Here's what good looks like:

Sales Rep: "Their VP of Operations told me that if they don't reduce their fulfillment errors by 30% before Q3, they'll miss their customer satisfaction targets, which are tied to their board commitments. She said this is priority #2 for the year, right after the ERP migration. If they don't fix this, she's worried about her job."

See the difference? That's validated. That's specific. That's a 3.

The Baseline Question

Here's a question that separates real deals from fantasy:

"What would it take—in time, money, people, and resources—for you to accomplish this WITHOUT us or anyone else?"

This question forces the prospect to consider the "do nothing" option. And remember: 40-60% of deals are lost to "no decision." Not to competitors. To the choice to keep things the way they are.

If they can solve the problem without you—even if it's harder, slower, or more expensive—they might. Especially if the strategic priority isn't clear. Especially if there's no compelling reason to act now.

The Baseline Question does two things:

First, it surfaces whether they've even considered alternatives. If they haven't thought about building it internally or cobbling together a DIY solution, that's actually a good sign—it means they're serious about buying.

Second, it gives you the chance to make the case against "do nothing." Once they've walked through what it would take to solve this themselves, you can show them why your solution is faster, cheaper, or better.

But if you never ask the question, you’re flying blind. You don’t know if “do nothing” is on the table. And you can’t beat an option you don’t know exists.

The $2M Proposal That Got Rejected

Let me tell you a story that still makes me wince.

A few years ago, a company came to us asking for help with their sales strategy. Big company. Serious opportunity. They’d done internal research showing that if they implemented what we were proposing, they’d see a 100x return. That’s not a typo—$2 million investment, $200 million potential impact.

We put together a comprehensive proposal. We showed them the ROI. We walked them through the implementation plan. We got verbal buy-in from multiple stakeholders.

They said no.

Not “no, we’re going with someone else.” Just “no, this feels too expensive.”

Here’s what happened: we focused on the outcome instead of the strategic priority. We sold them on the $200 million upside without ever connecting it to what they were trying to achieve as a business. We never asked, “What goal for the next 12 months does this enable?” We never validated with the Decision Maker that this was urgent.

So when it came time to sign, the CFO looked at the $2 million price tag and thought, “That’s a lot of money.” Not “That’s a lot of money, but we need this to hit our growth targets.” Just “That’s a lot of money.”

The deal died because we never moved them from tactical to strategic. We showed them what was possible. We never made them articulate why it mattered.

That's a Business Motivation failure. And it cost us a $2 million deal.

Using Business Motivation to Close

Once you've got a solid Business Motivation score—ideally a 3—you can use it to accelerate the close.

Here's how:

Reinforce their words, not yours.

"You told me that if you don't solve this by Q3, your expansion plans are at risk. Is that still true?"

Notice I'm not creating urgency. I'm reflecting what they already said. That's way more powerful than me pushing.

Connect the dots to their timeline.

"You mentioned you need this in place by the end of Q2 to support the product launch. That gives us about 8 weeks to get contracts signed, implementation scheduled, and your team trained. Does that timeline still work?"

Again—not my urgency. Theirs.

Surface the consequences of delay.

"If we push this to next quarter, what happens to the goal you mentioned around hitting your margin targets?"

This isn't pressure. It's a question. But it forces them to confront the cost of inaction.

The key to all of this: you're not inventing urgency. You're not manufacturing consequences. You're reminding them of what they already told you.

That's why getting to a 3 matters so much. Because once the Decision Maker has articulated the strategic priority, the timeline, and the consequence of not acting, you can use their own words to keep the deal moving.

Manufacturing Urgency vs. Discovering It:

Here's what manufacturing urgency sounds like (and why it fails):

Salesperson: "We're running a special this quarter. If you sign by Friday, I can get you 20% off."

Prospect: "Let me think about it."

Or this:

Salesperson: "The longer you wait, the longer you're losing money. Every month you don't have this in place costs you $50,000."

Prospect: "That's a pretty aggressive assumption."

Both of these reek of commission breath. The salesperson is pushing their urgency onto the prospect instead of pulling the prospect's urgency out.

Here's what discovering urgency sounds like:

Salesperson: "You mentioned earlier that you need this in place before your Q3 product launch. That launch is 10 weeks away. If we're going to hit that deadline, when do we need to have contracts signed?"

Prospect: "Probably in the next two weeks. We need at least 6 weeks for implementation and training."

Salesperson: "Got it. And what happens to the product launch if we're not ready?"

Prospect: "We'd have to delay it, which would mess up our entire revenue plan for the year. That's not an option."

See how that works? The salesperson isn't creating urgency. They're surfacing the urgency that already exists. The prospect is the one saying "we need to move fast" and "delay isn't an option." That's way more powerful than any discount deadline or scare tactic.

Action Items

Alright, let's make this practical. Here's what you need to do this week:

1. Score your current top 5 opportunities on Business Motivation (0-3). Be honest. Not hopeful. If you're using "I think" language, you don't have a 2 or 3.
2. For any opportunity where you're at a 1 or below: Schedule a call specifically to validate the strategic priority. Use the time boxing technique. Ask: "What are the biggest challenges you need to solve over the next 12 months?" Then connect the tactical problem to the strategic goal.
3. For any opportunity where you're at a 2: Validate with the Decision Maker. Don't assume your Ambassador got it right. Ask the Decision Maker directly: "How does solving this connect to your priorities for the year?" and "What happens if this doesn't get fixed?"
4. Practice the Baseline Question on your next 3 discovery calls: "What would it take for you to accomplish this without us or anyone else?" See what you learn.

5. Check yourself for Happy Ears. If you can't articulate the Business Motivation in the prospect's exact words, you don't have it. Go back and ask better questions.

Business Motivation is the difference between deals that close and deals that die. Get this right, and everything else gets easier.

Now let's move to Chapter 6, where we're going to talk about your real competition. Here's a question: What if I told you that 40-60% of the deals you lose aren't going to competitors at all? What if your biggest competition isn't another vendor—it's the decision to do nothing?

Chapter 6 is about winning the battle you didn't even know you were fighting.

CHAPTER 6

Positioning Against Competitors

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What's your biggest competitor?

If you named another company—a direct competitor, someone who sells something similar—you're wrong.

Your biggest competitor is the ***status quo***. The decision to do nothing. Keep things the way they are. "Maybe next quarter." "We need to think about it." "Not the right time."

40-60% of deals are lost to "no decision." That's not a competitor stealing your business. That's the prospect deciding that the pain of change isn't worth the benefit.

Let me say that again because most salespeople don't get it: If you lose to the status quo, you failed to differentiate. Not against other vendors—against *inaction*.

You can beat every other vendor in a competitive evaluation and still lose. Why? Because you never made the case for why changing is better than staying the same. You focused on why you're better than the competition without first proving why *doing anything at all* is worth it.

This chapter is about how to position against all three types of competitors you're facing in every deal: the status quo, alternative solutions, and internal options. Most salespeople only prepare for one. If you want to win consistently, you need to beat all three.

The Three Competitors You're Always Facing

Let me break down the three types of competition you're up against in every single deal.

Competitor #1: Status Quo

This is the "do nothing" option. "We'll keep doing what we're doing." It's the most dangerous competitor because it's invisible.

Here's what makes the status quo so powerful:

It's cost-effective. No budget approval needed. No purchase order. No procurement process.

It's easy to adopt. No change management. No training. No disruption.

It's simple. Everyone already knows how it works.

It's proven. Whatever they're doing now, it got them to where they are today.

The status quo wins by default unless you give them a compelling reason to change. And here's the brutal truth: most salespeople never do.

They focus on features. They talk about what their solution *does*. But they never connect those features to why *not changing* will cost the prospect something they actually care about.

This is where Business Motivation from Chapter 5 comes in. You can't beat the status quo until you've established why the problem they're living with is worth solving. Once you've done that, then—and only then—can you talk about why *your* solution is the right way to solve it.

Competitor #2: Alternative Solutions

These are the other vendors. The companies you know about. The names on the shortlist.

Most salespeople prepare for this competitor. They know the feature comparison. They've got talking points for why they're better. They've rehearsed the demo.

Here's the problem: If you're only competing on features, you're playing a game you can't win. There's always someone cheaper, faster, or with one more checkbox checked.

The key to beating alternative solutions isn't having *more* features. It's understanding which features matter *to this specific Decision Maker* based on their strategic priorities.

That's differentiation. Not "look at all the things we can do," but "here's exactly why what we do solves the problem you told me keeps you up at night."

Competitor #3: Internal Options

"We'll build it ourselves." "We'll hire someone to handle it." "We'll use this other tool we already have."

Internal options are tricky because they sound reasonable. Why pay for something when you can do it yourself?

The way you beat internal options is by making the hidden costs visible. What will it actually cost to build? How long will it take? What's the opportunity cost of dedicating internal resources to this instead of their core work?

Most companies underestimate the true cost of internal solutions by about 3x. They think "it'll take two developers a month" when the reality is six months, three developers, ongoing maintenance, and the distraction of everyone else who gets pulled in to support it.

Your job is to help them see that math before they commit to it.

You have to beat all three. Not one. Not two. All three. And you have to beat them in order: status quo first, then alternative solutions, then internal options.

The Scoring System (0-3)

Here's how you score your competitive position for any opportunity:

Score 0: You have no information about competition.

You're flying blind. You don't know who else they're talking to. You don't know if they're considering staying with their current approach. You're guessing.

What this looks like: "I assume they're looking at others..." or "They haven't mentioned anyone else."

If you're at a 0, you need to ask directly. Most prospects will tell you. The ones who won't are probably not serious about buying anyway.

Score 1: You know who the competitors are, but the prospect can't articulate your differentiation.

You asked. They told you. "We're also talking to X and Y." Great. But can they explain why you're different? Can they tell their boss why they'd choose you?

If not, you're in trouble. Because when decision time comes, you'll sound like everyone else.

What this looks like: "They're also talking to Competitor A and Competitor B." But when you ask what makes you different, they say "I'm not sure" or "You seem pretty similar."

Score 2: You're differentiated, and the prospect can articulate your strengths and weaknesses compared to competitors.

This is solid. The prospect understands how you're different. They can explain why you might be the right choice. They're also honest about where competitors might be stronger.

What this looks like: "We told our boss you're stronger on integration speed, but Competitor X is cheaper. For us, the speed matters more because of our Q3 deadline."

A score of 2 means you're in the running. You've got a real shot.

Score 3: The Decision Maker has stated a preference for your solution.

This is where you want to be. The person who signs the check has said "you're our top choice" or "we want to move forward with you."

Not your Ambassador. Not the technical buyer. The *Decision Maker*.

What this looks like: "She said we're their top choice pending final pricing approval."

A score of 3 doesn't guarantee you'll win—pricing, contracts, and internal politics can still derail things. But it means you've done the competitive positioning work. Now you just need to close.

Before you present any proposal, demo, or solution, you should aim for at least a 2 in the Competitors category. If you're below that, you're guessing. And guessing is how deals slip to "no decision" or get stolen by competitors you didn't even know existed.

Questions to Understand the Competitive Landscape

Here are the specific questions you need to ask to move from a 0 to a 3. These aren't generic discovery questions. These are surgical. They surface exactly what you need to know to position yourself effectively.

Questions About Status Quo

"What's working about your current approach? What's not?"

This surfaces what you're up against. If everything is working great, you've got a status quo problem. If there are clear pain points, now you know what needs to change.

"What would it take for you to stick with what you're doing now?"

This flips the question. Instead of asking why they'd change, ask why they'd stay. Their answer tells you what you're competing against.

"What's the cost of not changing—in the next 12 months?"

This is the time-boxing technique from Chapter 5, applied to competitive positioning. Force them to think about what staying the same will cost them over a specific timeframe.

Questions About Other Vendors

"Who else are you talking to?"

Ask directly. Don't dance around it. Most prospects will tell you. If they won't, that's a red flag.

"What do you like about what they're offering?"

This tells you what you're competing against. Maybe it's price. Maybe it's a specific feature. Maybe it's an existing relationship. Whatever it is, you need to know.

"Where do you see the key differences between us?"

This is critical. Don't tell them what makes you different. Ask them what they think makes you different. Their answer reveals how well you've communicated your value.

If they can't articulate a clear difference, you're at a 1. You've got work to do.

Questions About Your Differentiation

"Based on what you've seen, what stands out about our approach?"

Open-ended. No leading. Just ask them to reflect back what they've heard and what resonates.

"If you had to explain to your boss why you're recommending us, what would you say?"

This is the single most important question in this chapter.

Why? Because this is exactly what they'll need to do when you're not in the room. If they can't articulate your value proposition to their boss, you haven't done your job.

Listen to their answer. If it's vague—"You guys seem good" or "We like your solution"—you're in trouble. If it's specific—"You're the only one who can integrate with our legacy system without a 6-month implementation"—you're in great shape.

Their answer to this question tells you everything you need to know about where you stand competitively.

The APAC Objection Handling Model

Let's talk about what to do when a prospect throws you an objection. Not if. When.

Most salespeople handle objections badly. They either get defensive ("Actually, we're not more expensive when you consider…") or they cave immediately ("Let me see what discount I can get you").

Neither works. The first makes you sound desperate. The second trains them to push harder.

Here's a better way: APAC.

APAC stands for Acknowledge, Probe, Answer, Confirm. It's been around for decades. I've used it personally for that long. It works because it treats objections not as obstacles to overcome, but as information to understand.

Step 1: Acknowledge

When someone raises an objection, acknowledge it. Show you heard them. Don't argue. Don't defend. Just let them know you're listening.

Example: "I appreciate you raising that concern about price."

That's it. Simple. Non-defensive. You're not agreeing with them. You're acknowledging that they said it.

Step 2: Probe

This is the most important step. Before you answer the objection, you need to understand what's really going on.

Ask 2-3 probing questions to dig deeper. The first objection is rarely the real objection.

Example:

> Prospect: “Your price is too high.”

>

> You: “Tell me more about that. What are you comparing us to?”

>

> Prospect: “Well, Competitor X is $5,000 less.”

>

> You: “Interesting. What do you see as the main differences between what they’re offering and what we’re offering?”

>

> Prospect: “They don’t have the integration piece you have. But we might be able to live without that.”

>

> You: “Got it. Earlier you mentioned integration with your legacy system was critical for hitting your Q3 deadline. Has that changed?”

See what just happened? We went from “price is too high” to “actually, we need this feature that only you have.”

You only get there by probing. Ask at least 2-3 questions before you try to answer. Most objections dissolve under gentle questioning.

Step 3: Answer

Now that you understand what’s really going on, you can address the objection.

But don’t just answer. Reframe their objection back to them first to confirm you’ve understood correctly.

Example:

> “Let me make sure I understand. Your concern is that compared to Competitor X, our price is $5,000 higher. But the reason for that difference is the integration capability that you told me was critical for meeting your Q3 deadline. Is that right?”

Wait for them to say “Yes” or “Exactly.” This is critical. You need them to confirm you’ve understood before you move forward.

Then you answer:

> “So the question becomes: Is that integration capability worth $5,000 to you? And based on what you’ve told me about needing to hit Q3, and the fact that building it yourselves would take 6 months, I’d say it’s worth quite a bit more than that. Does that make sense?”

You’re not telling them the price is fair. You’re helping them connect the value to the investment. There’s a huge difference.

Step 4: Confirm

After you’ve answered, confirm you’ve actually addressed their concern.

Example: “Does that address your concern about pricing?”

Don’t assume. Ask.

If they say yes, great. Move forward. If they say no, probe again. There’s something else going on.

APAC works because it treats objections as conversations, not battles. You’re not fighting to convince them. You’re exploring together to understand what’s really important.

Master this, and you’ll handle objections like a pro. Skip it, and you’ll spend your career pushing back on price objections that were never really about price at all.

Differentiation: The Conversation That Wins Deals

Let's talk about differentiation. Not the marketing version—"We're the leading provider of innovative solutions." That's garbage.

Real differentiation is specific. It's tied to what the prospect cares about. And it's something they can repeat back to their boss without reading a script.

Here's how you create real differentiation:

Step 1: Understand Their Priorities

You can't differentiate in a vacuum. You need to know what matters to them.

This comes from Chapter 5 (Business Motivation) and Chapter 4 (Decision Maker). What are their strategic priorities? What's the problem they're trying to solve? What happens if they don't solve it?

Once you know that, you can connect your capabilities to their priorities.

Step 2: Show How You Solve Their Specific Problem

Don't list features. Connect *your* capabilities to *their* specific situation.

Bad: "We have best-in-class integration capabilities."

Good: "You told me you need to integrate with your legacy system by Q3 or you'll miss your revenue target. We're the only vendor who's successfully integrated with that system before—we did it for Company X in half the time you're expecting."

See the difference? The second version ties your capability directly to their stated priority and provides proof it works.

Step 3: Get Them to Say It Back

This is the test. If they can't articulate your value proposition, you haven't differentiated.

Ask: "If you had to explain to your boss why you're recommending us over the alternatives, what would you say?"

Listen carefully. If they give you a clear, specific answer that ties back to their priorities, you've won the differentiation game.

If they give you something vague—"You guys just seem better"—you're not there yet. Keep working.

Remember: It's more important for the prospect to hear themselves say it than for us to tell them. The loudest voice in their head is always their own voice.

When You're Not the Best Fit

Let me tell you something that most sales managers won't: Sometimes you shouldn't win.

Sometimes, after you've done all the discovery, after you've understood their priorities, after you've mapped the competition—you realize you're genuinely not the best option for them.

Maybe their budget is $10,000 and your solution starts at $50,000. Maybe they need something incredibly simple and you're built for enterprise complexity. Maybe they're in an industry you've never served and your competitor has 10 case studies just like them.

When that's true, you have two choices:

Option 1: Keep pushing. Try to force the fit. Discount to get into their budget. Promise custom features you're not sure you can deliver. Hope they don't realize there's a better option.

This might work once. It won't work twice. Because either you'll win a customer who's going to be unhappy and churn, or you'll lose after wasting months of time you could have spent on better opportunities.

Option 2: Be honest. Tell them the truth.

"Based on what you've told me about your budget and your needs, I don't think we're the best fit right now. I think Competitor X is actually a better option for where you're at. Here's why…"

Here's what happens when you're honest: They trust you. Because you just put their interests ahead of your commission.

And you know what happens to people who trust you? They refer you to other people. They remember you when their situation changes. They become advocates even though they didn't buy from you.

I've closed deals 18 months after telling someone we weren't the right fit. Why? Because when their situation changed, I was the first person they called. They knew I'd shoot straight with them.

Walking away from bad-fit deals isn't giving up. It's focusing your time where it matters. You're only as valuable as the problems you solve. If you can't solve their problem better than anyone else, you shouldn't be trying to sell them.

If you can't honestly say you're the best option, either find the angle where you *are*—or move on.

Real Story: How Differentiation Won a $240K Deal

Let me tell you about Rebecca.

Rebecca was competing for a $240,000 software deal. The prospect was a mid-sized manufacturer looking to upgrade their inventory management system.

Rebecca was up against two competitors. One was cheaper by $40,000. The other had a bigger brand name and more features.

On paper, Rebecca should have lost. She wasn't the cheapest. She wasn't the biggest. She didn't have the most features.

Here's what Rebecca did:

First, she asked the right questions. She dug into their Business Motivation. She learned that their current system was causing 3-4 hour delays in fulfilling orders because inventory counts were constantly wrong. Those delays were costing them customers.

The CFO told her they'd lost two major accounts in the past year because of late shipments. One of those accounts represented $500,000 in annual revenue.

Then Rebecca asked about the competition.

"What do you like about what they're offering?"

The CFO said: "Company X is cheaper, and Company Y has more reporting features."

Rebecca didn't panic. She probed.

"That makes sense. Help me understand—what's more important to you: saving $40,000 upfront, or solving the inventory accuracy problem so you stop losing customers?"

The CFO paused. "Obviously solving the problem. But can't we do both?"

Rebecca had done her homework. She knew both competitors used a batch-update system for inventory—

meaning counts only refreshed every hour. Her system updated in real time.

She explained: “Here’s the thing. Company X is cheaper, but they use a batch system. That means you’re still going to have delays between when inventory moves and when your system knows about it. Company Y has great reports, but they’re also batch-based.”

“We’re the only one that updates inventory in real time. Which means when a part gets picked, your system knows immediately. No more overselling. No more delays. No more lost customers.”

Then she asked the magic question: “If you had to explain to your CEO why you’re recommending us, what would you say?”

The CFO said: “I’d tell him we need real-time inventory to stop losing customers. The other options are cheaper or have more features, but they won’t solve the core problem. If we lose another $500K account, we’ll wish we’d spent the extra $40K.”

Rebecca won the deal.

Not because she was cheaper. Not because she had more features. Because she connected her unique capability—real-time updates—to their specific problem—lost customers from inventory delays.

And because she got the CFO to articulate that value in his own words. When he went into that boardroom to present the decision, he didn’t need Rebecca there. He knew exactly what to say.

That’s differentiation. That’s how you win competitive deals.

Action Items

Here’s what you do this week:

1. Score your current top 5 opportunities on the Competitors category (0-3).

> Be honest. Do you know who the competitors are? Can the prospect articulate your differentiation? Has the Decision Maker stated a preference?

2. For any opportunity scoring below a 2: Ask the differentiation question this week.

> “If you had to explain to your boss why you’re recommending us, what would you say?”

>

> Listen carefully to their answer. If it’s vague, you’ve got work to do.

3. Practice APAC on the next objection you hear.

> Don’t defend. Don’t cave. Acknowledge, probe with at least 3 questions, answer by reframing their concern, and confirm you’ve addressed it.

4. Identify one deal where you might not be the best fit.

> Ask yourself: Can I honestly say we’re the best option for this prospect? If not, what’s my plan? Keep pushing, or be honest?

5. Review your losses from the past quarter.

> How many were lost to status quo? To competitors? To internal options? For each loss, identify what you could have done differently in your competitive positioning.

The goal isn't to win every competitive deal. The goal is to know where you stand, position yourself effectively against all three types of competition, and make sure the prospect can articulate why you're the right choice.

Do this consistently, and you'll find yourself winning deals you thought were lost—and losing fewer deals to "no decision."

Now go score your deals. I'll see you in Chapter 7, where we'll talk about understanding the decision-making process.

CHAPTER 7

Winning the Decision Process

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You can have the best solution in the world. You can have the right Decision Maker on the line. You can have strong business motivation driving urgency. And you can still lose.

Why? Because you didn’t understand how they were going to decide.

I’ve watched this play out hundreds of times. A salesperson spends weeks building relationships, delivering demos, answering questions—convinced they’re about to close. Then the prospect picks the competitor. Or worse, does nothing at all.

When you ask what happened, you hear some version of “I don’t know, they loved our solution.” They did love your solution. But they loved something about the competitor’s approach more—or they decided the risk of change wasn’t worth it—because you never understood what criteria they were actually using to make the decision.

Let me be direct: Knowing who makes the decision isn’t the same as knowing how they’ll make it. Chapter 4 was about WHO decides. This chapter is about HOW they decide. And if you don’t understand the difference, you’re leaving deals on the table.

Decision Process ≠ Decision Maker

Here's what trips people up: they think if they've talked to the Decision Maker, they've got the decision locked down. Not even close.

The Decision Maker is the person who holds the purse strings, the person with authority to say yes. But the Decision Process is everything that happens between "I'm interested" and "Let's do this." It's the criteria they'll use to evaluate you. It's the internal process they have to follow. It's the timeline that's driving their urgency—or lack thereof.

You can know the Decision Maker and still not know their criteria, their timeline, or their process. And without that information, you're flying blind.

Think about it this way: In B2B, research shows the buying group typically comprises 6-10 people. Each of those people has their own priorities based on their role, their department, their personal experiences. The CTO cares about scalability. The CFO cares about ROI. The VP of Operations cares about implementation speed. They're all evaluating you through different lenses.

And here's the kicker: Those criteria might not even be explicit. The Decision Maker might not have told you—or even consciously identified—what factors will actually drive the decision. Your job is to uncover them, validate them, and then win them.

The Scoring System (0-3)

Let me give you the framework for assessing where you stand on Decision Process. Like every category in the O2C, it's scored on a 0-3 scale. Here's what each score means:

Score 0: No information on decision criteria. You have no idea what factors will drive this decision. You're operating on assumptions. “I think they care about price and quality” doesn’t count. If you haven’t asked, you’re at a 0.

Score 1: Ambassador told you the criteria, but you haven’t validated it with the Decision Maker. Maybe Sarah from Marketing told you they’re looking for ease of use. Great. But Sarah isn’t the CFO who’s signing the check. Until you hear it from the Decision Maker, you’re still operating on secondhand information.

Score 2: Criteria validated with the Decision Maker, but you haven’t confirmed you’ve won them. The CFO confirmed that cost savings is the #1 priority. Now you know what matters. But you haven’t gotten explicit confirmation that your solution best meets that criteria. You’re close, but not across the line.

Score 3: You’ve confirmed you’ve won the criteria, and the Decision Maker has agreed to move forward. They’ve said—explicitly—that you best meet their criteria and they’re ready to proceed. This is where you want to be before you submit a proposal or do a final demo.

Notice the progression: 0 = guessing, 1 = secondhand info, 2 = validated but not won, 3 = confirmed winner. Each step requires active work on your part. The criteria don’t just reveal themselves. You have to dig for them.

Three Things You Must Know

When it comes to Decision Process, there are three elements you absolutely have to understand:

1. Decision Criteria—What factors will they use to evaluate options?

This is the big one. What actually matters to them? Is it price? Speed of implementation? Ease of use? Integration capabilities? ROI within 12 months? All of the above? And more importantly, which one is most important?

Most salespeople assume they know. “Obviously they care about price.” Maybe. Or maybe they care about risk mitigation more than price. Or maybe the CEO just got burned by a slow implementation and now speed is everything. You won’t know until you ask.

2. Decision Process—Who’s involved? What’s the sequence? What approvals are needed?

This is the infrastructure of the decision. Who else needs to weigh in? What’s the approval chain? Does Legal need to review the contract? Does IT need to sign off on security? Does the CEO need to bless it even if the CFO has authority?

Here’s where deals get stuck: You think you’re talking to the Decision Maker, and you are—but there’s a hidden approval step you didn’t know about. Procurement has to review all contracts over $100K. Or the board has to vote on any new vendors. Or IT has a 30-day security review process that nobody mentioned.

Find out what the process is before you get to the end and discover there are three more hoops you didn’t know existed.

3. Decision Timeline—When do they need to decide? What’s driving that date?

This is where urgency comes from—or doesn’t. “We’d like to move forward soon” is not a timeline. “We need a solution in place by Q2 because that’s when we’re launching the new product line and we can’t do it without this capability” is a timeline.

What you’re looking for is the forcing function. Why now? What happens if the decision takes longer than expected? What’s the consequence of delay?

If they don’t have a specific date and a clear reason for that date, you don’t have urgency. And without urgency, deals slip. They “need more time to think.” They want to “evaluate a few more options.” They disappear into the status quo.

Questions to Uncover Decision Process

Alright, enough theory. Let me give you the actual questions that work. Not discovery questions that sound good on a coaching call. The specific prompts that get prospects to reveal their real decision criteria, process, and timeline.

On criteria:

“What factors are most important as you evaluate options?”

“If you had to pick the top 3 things that will drive this decision, what would they be?”

“How will you measure whether a solution is successful?”

Notice what these questions do: they force prioritization. Not “what do you care about”—because they’ll say “everything matters.” But “what are the top 3”—now they have to make choices. And those choices tell you what really matters.

On process:

“Walk me through how decisions like this typically get made here.”

“Who else needs to weigh in before you can move forward?”

“What approvals are required? Legal? Procurement? Executive sign-off?”

Don’t accept “it’s just me” as an answer unless you’ve explicitly asked about every potential checkpoint. Even if the CFO has authority, there might be a procurement policy. Even if the VP can sign off, the CEO might want to review anything over a certain dollar amount.

On timeline:

“When do you need to have a solution in place?”

“What’s driving that timeline?”

“What happens if the decision takes longer than expected?”

That last question is critical. It separates real urgency from wishful thinking. If the answer is “well, we’d just push it to next quarter,” you don’t have urgency. If the answer is “we miss the product launch and we lose $2M in revenue,” now you’ve got urgency.

Validating vs. Assuming Criteria

Here’s where Happy Ears will destroy you: assuming you know what they care about.

You’ve been selling this solution for two years. You know what everybody cares about. CIOs care about scalability. CFOs care about cost. VPs of Sales care about adoption. You’ve heard it a thousand times, so you assume this prospect is the same.

Wrong. Maybe this CIO just got promoted from VP of Product and cares more about user experience than scalability. Maybe this CFO is under pressure to show innovation, not cost savings. Maybe this VP of Sales just had a competitor steal half her team and she cares about retention features more than adoption.

The criteria can change depending on the person you're talking to, the company's current situation, and what fire they're trying to put out this quarter. Don't assume. Validate.

And here's the thing: If your Ambassador says they care about X, you still need to hear it from the Decision Maker. Not because your Ambassador is lying—they're probably telling you what they care about. But the Decision Maker might have different priorities.

In a 6-person Decision Making Unit, you might have 6 different priority lists. Your job is to understand all of them and figure out which criteria are deal-breakers vs. nice-to-haves.

Winning the Criteria

Knowing the criteria isn't enough. You have to win them.

This is the difference between a Score 2 and a Score 3. At a 2, you've validated what matters. At a 3, you've gotten explicit confirmation that you meet—or better yet, exceed—their criteria better than the alternatives.

Here's how you do it: Tie your capabilities directly to their specific criteria. Don't give them a generic pitch. Connect the dots for them.

"You told me integration speed is your top priority because you need to be live by Q2. Let me show you how we do that in half the time of typical implementations—and here are three clients in your industry who went from contract to launch in 45 days."

See what that does? You're not bragging about your implementation speed in the abstract. You're demonstrating that you meet their specific criteria better than they expected. And you're backing it up with proof.

Then you get explicit confirmation: “Based on what you’ve seen, do you feel we meet your criteria for integration speed?”

If they say yes, you’ve won that criterion. If they hedge, you haven’t. And if they say “I’m not sure,” you need to find out what’s missing.

Don’t leave this to inference. Don’t assume that because they’re nodding along, they’re convinced. Make them say it. “Yes, you meet our criteria.” Because when it comes time for them to make the decision—and they’re comparing you to two other vendors—you want them to have already told you you’re the best fit.

It’s more important for the prospect to hear themselves say it than for us to tell them.

When Criteria Change

Here’s something nobody tells you: Criteria change.

You spent two months understanding their top priorities. You validated everything with the Decision Maker. You positioned your solution perfectly. Then a new stakeholder joins the conversation. Or the CEO reads an article about AI and suddenly that’s a requirement. Or a competitor gets hacked and now security is the #1 concern instead of #3.

This happens all the time. Don’t panic. Adapt.

When you notice a shift in priorities, address it directly: “I noticed you mentioned AI capabilities a few times today. How does that factor into your criteria now? Is that something that’s moved up in priority?”

Sometimes the criteria didn’t change—they just revealed a hidden requirement. Sometimes it’s a genuine shift based on new information or a change in the market. Either way, you need to re-validate.

Go back to your questions. “Are we still aligned on the top 3 priorities, or has something shifted?” Don’t assume the criteria from six weeks ago are still valid today. Sales cycles take time, and companies move fast. Validate early, validate often.

Real Story: The Deal That Almost Died

Let me tell you about a deal one of my clients almost lost because they didn’t understand the Decision Process.

They were selling a SaaS platform to a mid-market company. The VP of Sales was their champion—loved the product, loved the team, pushed hard internally. They’d done multiple demos. The pricing was agreed upon. Everything looked great.

Then the deal stalled. Week after week, “just need a little more time.” Finally, the VP admitted: “The CEO wants to see one more competitive option.”

Here’s what my client hadn’t done: They’d never asked what criteria the CEO would use to evaluate the options. They’d assumed price and functionality were all that mattered. But the CEO cared about something else entirely—vendor stability. He’d been burned by a startup that went under mid-contract, and he wasn’t going to take that risk again.

The competitor? A bigger company with a longer track record. On paper, they looked safer.

Once my client understood the real criterion—vendor stability—they could address it. They brought in case studies from Fortune 500 customers. They showed their funding history and growth trajectory. They positioned themselves not as a risky startup but as an established player with institutional backing. And they won the deal.

But here’s the key: They almost lost it because they never asked. They assumed they knew what mattered. The lesson? Never assume. Always validate. And keep validating until the contract is signed.

Action Items

Alright, let’s make this practical. Here’s what you’re going to do this week:

1. Score your current top 5 opportunities on Decision Process (0-3). Be honest. If you can’t articulate their top 3 criteria in their words, not yours, you’re not at a 2. If you haven’t gotten explicit confirmation that you meet those criteria better than alternatives, you’re not at a 3.

2. For any opportunity below a 2: Ask “What are the top 3 factors driving this decision?” this week. Get them on the phone. Get them in a meeting. But get the answer. And don’t accept vague generalities—push for specifics.

3. For any opportunity at a 2: Get explicit confirmation that you meet their criteria. “Based on what you’ve seen, do you feel we’re the best fit for [specific criterion]?” Make them say yes. If they hedge, find out why. If they say yes, you’ve moved to a 3.

Stop guessing. Stop assuming. Start validating. The Decision Process isn’t some mystery—it’s information waiting to be uncovered. Your job is to ask the right questions, listen carefully to the answers, and position yourself to win the criteria that actually matter.

Because here’s the truth: You can have the best solution, the right Decision Maker, and strong business motivation—but if you don’t understand how they’re going to decide, you’re leaving it up to chance. And chance is not a sales strategy.

Now get to work. Your pipeline is waiting.

CHAPTER 8

Navigating the Paper Process

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End of quarter. It's 5 PM on a Tuesday. Robyn's watching her forecast screen like it's the final seconds of a tied basketball game.

She's got six deals projected to close. Been working them all quarter. Strong business motivation—checked. Decision Maker engaged—checked. Proposals submitted weeks ago—checked. Everyone's said yes.

Four of those six deals just slipped to next quarter.

Not because the prospects changed their minds. Not because a competitor swooped in. Not because budget disappeared.

Because she forgot one thing: The customer has their own Paper Process.

Here's what happened. Robyn thought 'contracts are done' meant the deal was done. She submitted the contracts to her prospects, got verbal confirmations, and moved them to 'Commit' in her CRM. In her mind, it was just a matter of getting signatures.

What she didn't account for:

Deal One: Had to route through legal, who found three terms they wanted to renegotiate. That took another two weeks.

Deal Two: Needed procurement approval. Procurement moves at its own pace. They don't care about your quarter.

Deal Three: Required CFO sign-off. CFO was on vacation. No backup authorization in place.

Deal Four: Security review flagged something minor that turned into a three-week back-and-forth about data encryption standards.

Robyn's a seasoned seller. Ten years in. She's good at building relationships, diagnosing needs, positioning against competitors. But she missed this:

Closing isn't done until the check clears.

And between 'yes' and 'signed,' there's a whole process most salespeople don't ask about until it's too late.

That process? That's what we're going to fix right now.

What the Paper Process Actually Is

Let's be clear about what we're talking about here. The Paper Process is everything that happens between 'yes' and 'signed.'

It includes:

Legal review. Contract redlines. Procurement approval. Internal sign-offs. Security assessments. Vendor registration. MSAs. SOWs. Purchase orders. Finance approval. Executive signatures. Countersignatures.

Every company has one. Some are simple—one person reviews, one person signs, done in two days. Some are

Byzantine nightmares that take six weeks and involve twelve people you've never heard of.

And here's the kicker: Most salespeople don't ask about it until they're already in it.

You submit the contract. Then you sit there refreshing your email. Waiting. Wondering. Getting increasingly nervous as the quarter deadline approaches. Sending 'just checking in' messages that make you sound desperate.

Meanwhile, your contract is sitting in someone's inbox. Fourth in a queue of seven contracts. That person's swamped. They'll get to it when they get to it. Your urgency is not their urgency.

Want to avoid that? Ask about the Paper Process before you submit the proposal.

Not after. Before.

The Scoring System (0-3)

Like every other category in the O2C framework, Paper Process gets scored from 0 to 3. Here's what each score means:

Score 0: No Information

You've got no idea what happens after they say yes. You're assuming it's simple. It's not simple. You're going to get blindsided.

What it looks like: 'They said they're ready to move forward, so I sent the contract. Now I'm waiting to hear back.'

Score 1: Process Exists, Haven't Entered It

You’ve confirmed there’s a process. You know the steps. But you haven’t started yet. The contract hasn’t been submitted, or it’s been submitted but hasn’t entered review.

What it looks like: ‘I know they need legal review, and it typically takes two weeks. We haven’t submitted the contract yet.'

Or: ‘I submitted it yesterday. Legal hasn’t started reviewing it yet.'

Score 2: In Process, Timeline Defined, No Intervention Plan

You’re in it. Legal has the contract. They’ve given you redlines. You’ve returned revisions. There’s a timeline. But here’s the problem: You’re hoping it stays on track. You don’t have a backup plan if it stalls.

What it looks like: ‘Legal has it now. They said two weeks. I’m following up every few days. Fingers crossed it doesn’t slip.'

If something goes sideways—legal gets bogged down, procurement takes longer than expected, someone goes on vacation—you’re stuck. You’ve got no one who can push things forward.

Score 3: Decision Maker Will Intervene + Compelling Event Driving Completion

This is where you want to be. You’re in the process, timeline’s defined, and you’ve got two critical elements:

One: The Decision Maker has committed to intervening if things stall. They’ve said, ‘If legal slows this down, I’ll escalate.' Or, ‘If procurement drags, I’ll get the CFO involved.' They have skin in the game.

Two: There’s a compelling event creating urgency. They need this solution live by a specific date. A product launch. A compliance deadline. End of fiscal year. Something real that makes them care about finishing on time.

What it looks like: ‘Legal’s reviewing now. If it stalls, the CFO will step in—she told me directly. They need this for their Q2 product launch, so there’s real pressure to close by March 15th.'

That’s a Score 3. That’s a deal you can forecast with confidence.

The Questions to Ask BEFORE the Proposal

Most salespeople wait until after they’ve submitted a proposal to start thinking about the Paper Process. By then, it’s too late to influence it.

Ask these questions during your discovery or demo calls —before you send anything:

'*Walk me through what happens after we submit a proposal. What’s the process on your end?*'

This is the big one. Don’t assume. Make them spell it out.

'*Who needs to review the contract? Legal? Procurement? Security? Anyone else?*'

You need to know all the players. If they say ‘just legal,' dig deeper. Ask if there’s anyone else who might get pulled in.

'*What’s the typical timeline for contract review here?*'

Don’t accept ‘pretty quick.' Get specific. Two days? Two weeks? Two months?

'*Have there been deals that got stuck in this process before? What happened?*'

This is gold. They'll tell you where the bottlenecks are. Listen carefully.

'*If things get delayed—say legal takes longer than expected—who can step in to move things forward?*'

This is how you find out if your Decision Maker has real authority. If they say 'no one,' you're in trouble.

'*When do you need this solution in place? What's driving that timeline?*'

This connects Paper Process to your Compelling Event. If they don't need it by a certain date, there's no urgency to finish the paperwork.

Once you've asked these questions, you'll know whether you're walking into a two-week process or a two-month nightmare. And you can plan accordingly.

The Paper Process Timeline Exercise

Here's a move that separates amateurs from pros: Map out the Paper Process with your prospect. Do this on a call. Share your screen. Build it together.

Walk through it step by step:

Day 1: Proposal submitted.

Day 3: Legal receives it for review.

Day 10: Legal sends redlines.

Day 12: You return revisions.

Day 17: Legal approves.

Day 18: Goes to CFO for signature.

Day 21: Signed and returned to you.

Day 22: You countersign. Deal closed.

That’s a 22-day process. If you’re trying to close by the end of the month and you submit on the 15th, you’re cutting it close. If you submit on the 20th, you’re not making it.

But if you’ve mapped this out with your prospect three weeks before quarter-end, you’ve got time to adjust. You can submit early. You can get the Decision Maker to commit to expediting if needed.

Here’s the line that matters:

If you don’t know the timeline, you can’t forecast accurately.

You’re just guessing. And guessing is not a sales strategy.

The Intervention Question

This is what separates Score 2 from Score 3:

'*If this process stalls or takes longer than expected, who can step in to keep it moving?*'

You want the Decision Maker to answer this. And you want them to commit to being that person.

Best case: They say, ‘If it gets stuck, I’ll handle it. I’ll talk to legal directly. I’ll escalate to the CFO if needed.'

If they say that, you’ve got a Score 3. They’ve got skin in the game. They care about getting this done on time. They’ll push if necessary.

Worst case: They say, ‘I don’t really have control over that. Legal moves at their own pace.'

That’s a red flag. If your Decision Maker can’t or won’t intervene, you don’t have a real Decision Maker. You’ve got someone who wants your solution but doesn’t have the authority to make it happen.

And if that’s the case, you need to find someone higher up who

can intervene.

When the Paper Process Stalls (And What to Do About It)

Even if you’ve done everything right, things can still go sideways. Legal gets backed up. Procurement moves slower than expected. Someone key goes on vacation. A new stakeholder appears with questions.

Here’s what NOT to do:

Don’t just sit there hoping it resolves itself. Don’t send passive ‘checking in’ emails every two days. Don’t assume someone else is handling it.

Here’s what TO do:

Step 1: Ask your Ambassador what’s happening.

They’re on the inside. They can tell you if it’s a normal delay or if something’s actually wrong. Call them. Don’t email. Get them on the phone.

Step 2: Remind the Decision Maker about the compelling event.

If they told you they need this solution by March 1st for their product launch, remind them we’re running out of time. Don’t be dramatic. Just factual: ‘We’re at Day 18 of a 22-day process. If we want to hit your March 1st launch date, we need to accelerate.'

Step 3: Ask what you can do to help.

Sometimes legal’s stuck because they need clarification on something. Sometimes procurement needs additional documentation. Ask: ‘What information can I provide to speed this up?'

Step 4: Activate the intervention plan.

If you’ve built a Score 3 scenario, now’s the time to use it. Go back to your Decision Maker: ‘You mentioned you’d escalate if things got delayed. We’re at that point. Can you reach out to legal directly?'

Most of the time, that’s all it takes. One email from the Decision Maker to legal, and suddenly your contract jumps to the front of the queue.

But you’ve got to ask. They’re not going to do it unless you prompt them.

The Compelling Event Connection

Let’s talk about why Paper Process and Compelling Event are inseparable.

If there’s no compelling event—no real deadline, no urgent need—there’s no pressure to finish the paperwork. Legal will get to it when they get to it. Procurement won’t rush. Nobody cares about your quarter.

But if there’s a compelling event—a product launch, a fiscal year-end, a compliance deadline, a contract renewal—then suddenly everyone has a reason to care. The Decision Maker will push legal. Procurement will expedite. Things move.

This is why I keep hammering on compelling events throughout this book. They're not just nice to have. They're the difference between deals that close on time and deals that slip.

Think about it from the prospect's perspective:

Scenario A: You're buying software. It's useful. You want it. But there's no deadline. You could start using it in March or June or September. Doesn't really matter.

Legal sends you three contract redlines. You're busy. You get to them when you get to them. The deal takes six weeks to finalize.

Scenario B: You're buying the same software. But now you've committed to launching a new service on April 1st. You've announced it publicly. Customers are expecting it. Your CEO's mentioned it in interviews.

You need this software live by March 15th to allow time for testing.

Legal sends three contract redlines. You respond within two hours. You escalate internally to make sure it doesn't stall. The deal closes in ten days.

Same contract. Same legal team. Different outcome. Why? Because in Scenario B, there's a compelling event creating urgency.

So if you're trying to move a deal through the Paper Process quickly, make sure you've established a real compelling event. Not a fake one. Not your end-of-quarter deadline. A real business reason they need to act.

If you haven't built that compelling event back in the Business Motivation stage, the Paper Process is going to be slow and painful.

Real Story: The Deal That Almost Slipped

Let me tell you about a deal that almost fell apart in the Paper Process—and how the rep saved it.

Company: Mid-sized SaaS platform selling to a financial services firm.

Deal size: $280K annual contract.

The rep—let's call her Maria—had done everything right up to this point. Strong business motivation. Solid Ambassador. Decision Maker engaged. Competitors eliminated. Decision criteria validated.

She submitted the proposal. They came back and said yes. Contract went to legal.

Maria had asked about the Paper Process. She knew it would take about three weeks—two weeks for legal review, one week for final approvals and signatures. Her quarter closed in four weeks. Plenty of time.

Week One: Legal starts their review.

Week Two: Legal sends redlines. Maria turns them around in 24 hours.

Week Three: Silence.

Maria follows up with her Ambassador. Ambassador says, 'Legal's reviewing the revisions. Should be done soon.'

Another three days. Still nothing.

Now Maria's getting nervous. She's got four days left in the quarter.

She calls her Ambassador again. 'What's the holdup?'

Ambassador finds out: Legal's been pulled into an emergency acquisition review. The SaaS contract fell to the bottom of the pile. It'll be at least another week.

Quarter closes in four days. Deal’s slipping. Maria’s commission is on the line.

Here’s what Maria did—and this is what saved the deal:

She called the Decision Maker. Not emailed. Called.

She said: ‘I know you told me this software needs to be live by the end of next month for your Q2 product rollout. We’re at risk of missing that timeline. Legal’s backed up with an acquisition. Is there any way you can escalate this internally?'

The Decision Maker—VP of Product—hadn’t realized there was a delay. He’d assumed everything was on track.

He sent one email to the General Counsel. Subject line: ‘Need SaaS Contract Prioritized for Q2 Launch.'

Two hours later, legal sent final approval. Contract was signed the next day.

Deal closed. Maria made quota.

Here’s what made this work:

Maria had established a compelling event early in the process. The VP of Product needed this software for a Q2 launch. That wasn’t Maria’s deadline—it was his.

She’d mapped out the Paper Process in advance. She knew what the timeline was supposed to look like.

When things went off-track, she didn’t wait and hope. She activated the intervention plan.

She reminded the Decision Maker about the compelling event and asked him to step in.

That’s a Score 3 Paper Process. That’s how you close deals on time.

Action Items

Alright. You've read the chapter. You understand the framework. Now here's what you need to do this week:

1. Score your current top 5 opportunities on Paper Process (0-3).

Be honest. Not hopeful. If you don't know the Paper Process, you're a 0. If you know it exists but haven't started, you're a 1. If you're in it but don't have an intervention plan, you're a 2. If you've got Decision Maker buy-in to intervene and a compelling event driving completion, you're a 3.

2. For any deal in negotiation or approaching close: Map out the Paper Process timeline this week.

Get on a call with your contact. Share your screen. Walk through it step by step. Day 1: Proposal submitted. Day X: Legal review. Day Y: Redlines. Day Z: Final approval. Day A: Signatures. Write it down. Put it in your CRM.

3. Ask the intervention question: 'If this process stalls or takes longer than expected, who can step in to keep it moving?'

Get a commitment. Ideally from your Decision Maker. You want them to say, 'If it gets stuck, I'll handle it.' If they won't commit to that, you don't have a real Decision Maker. Find someone who will.

That's it. Three actions. Do them this week.

The Paper Process is the last mile of the deal. You've done all the hard work—building relationships, diagnosing needs, positioning against competitors, navigating the decision process. Don’t lose the deal in the final stretch because you didn’t ask about the paperwork.

Map it out. Get a timeline. Secure intervention. Connect it to the compelling event.

Do that, and you’ll close more deals on time. I promise.

Next up: Chapter 9, where we’ll bring everything together and talk about what happens after you’ve scored all six categories. How to use the O2C framework to prioritize your pipeline, forecast with confidence, and close more deals.

Let’s finish strong.

CHAPTER 9

The Real Work Starts Now

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You've read the book. You understand the framework. You've seen the scoring system. You know about Ambassadors, Decision Makers, Business Motivation, Competitors, Decision Process, and Paper Process.

Now what?

Because here's the deal—information without action is just entertainment.

You can understand every concept in this book, nod your head at every example, and still walk back into your next sales call and do exactly what you've always done. You can know the O2C framework inside and out and still forecast based on gut feelings and hoping for the best.

And if that happens, nothing changes.

So I'm going to end this book the same way I start every coaching session with a new team: with a challenge.

The Challenge

Pull up your CRM right now. Look at your pipeline. Pick your top five opportunities—the ones you think are most likely to close this quarter.

Got them?

Now score each one across all six O2C categories. Use the 0-3 scale we've covered in every chapter:

Ambassador (0-3)

Decision Maker (0-3)

Business Motivation (0-3)

Competitors (0-3)

Decision Process (0-3)

Paper Process (0-3)

But here's the critical part: Be honest. Not hopeful.

Don't give yourself a 2 on Business Motivation because "they seemed interested." That's Happy Ears. If you can't articulate their strategic priority in their words, validated by their Decision Maker, you're a 1 at best.

Don't score yourself a 3 on Ambassador because "we have a good relationship." If they haven't taken you to the Decision Maker and actively sold on your behalf, you're not a 3.

Don't convince yourself you're a 2 on Paper Process because "they said it'll take about two weeks." If you haven't mapped out the actual timeline with specific steps and intervention points, you're a 0 or a 1.

Score them honestly. Because scoring them optimistically is how you end up surprised when they slip.

Once you've scored your top five opportunities, look at the weakest category in each deal. That's where you start.

Make a plan to improve it this week. Not next month. This week.

If your Ambassador score is a 1, schedule a call and ask them: “In addition to you, who else do you want involved in this decision?” Get them to take you to the Decision Maker.

If your Business Motivation score is a 1, stop assuming and start validating. Ask: “How does solving this connect to your goals for the next 12 months?” Make them articulate the strategic priority.

If your Decision Process score is a 0 or 1, get on a call this week and ask: “What are the top three factors driving this decision?” Then follow up with: “Based on what you’ve seen, do you feel we meet your criteria?”

The framework is useless if you don’t use it. So use it. This week. On real deals.

What Happens If You Don’t

Let me be direct with you about what happens if you read this book and don’t apply it.

You go back to forecasting based on gut feelings and hoping for the best.

You continue to be surprised when deals you thought were solid disappear. You continue to spend time on opportunities that were never going to close. You continue to miss quota because your pipeline is full of fiction instead of qualified deals.

The statistics I shared in Chapter 1 aren’t going away. 91% of organizations missed quota in 2024. Average sales rep turnover is 35%—three times higher than any other profession. Reps change jobs every 18 to 20 months. 40-60% of deals are lost to “no decision.”

Think about what that means for your life. Your income is unpredictable. Your job security is fragile. Your stress is constant. And every quarter, you're starting over, hoping this time will be different.

It doesn't have to be that way.

What Happens If You Do

I've watched Jim go from a performance improvement plan to closing $21.7 million.

I've watched Rodrigo go from selling nothing to closing $70 million over five years.

I've watched companies go from the edge of bankruptcy to successful acquisitions.

I've watched salespeople who were updating their resumes become the top performers their companies couldn't imagine losing.

This works. If you work it.

The deals you're working on right now—they're going to go one of three ways. You win them. You lose them to a competitor. Or they die to "no decision." O2C increases your odds in all three scenarios. It helps you identify winners earlier, disqualify losers faster, and make the case for change that beats the status quo.

What would it mean for you if you closed 300% more of your existing opportunities? Instead of $1 million, you close $3 million. Instead of scraping by, you're crushing quota. Instead of worrying about your job, you're fielding offers from competitors.

That's not fantasy. One of our clients proved it—they closed an additional $14 million in a single quarter after implementing O2C.

Same pipeline. Better system. Different results.

The O2C Promise

Here's what I know after 25 years in this business:

Sales is 75% science, 25% art.

The science part—the qualification, the validation, the systematic approach to moving deals forward—that's teachable. That's repeatable. That's O2C.

The art part—the relationship building, the timing, the way you read a room—that comes with experience. But here's the thing: You can't get good at the art if you're constantly failing at the science.

O2C gives you the science. It gives you a systematic way to know where you are in any deal, what you need to do next, and whether the deal is even worth your time.

It doesn't guarantee you'll win every deal. Nothing does. But it does guarantee you'll stop wasting time on deals that were never going to close. It guarantees you'll see problems earlier. It guarantees you'll forecast with confidence instead of hope.

And when you stop chasing ghosts and start working real opportunities, your close rate goes up. Your quota attainment goes up. Your stress goes down. Your job security improves. Your income stabilizes.

That's the O2C promise: A systematic approach to sales that works if you work it.

One Last Thing

What I want more than anything from this book is to hear from you.

If you apply what's in these pages and something changes —if you close a deal you would have lost, if you disqualify a time-waster earlier, if you finally crack an account you've been chasing—I want to know about it.

Email me at O2C@revheat.com.

Those stories fuel me. They prove this works. And they help other people believe it can work for them too.

If you need help implementing O2C in your organization, we're here. We've trained over a thousand salespeople. We've consulted with more than 150 CEOs. We've helped companies go from struggling to successful. We know how to take this framework from concept to execution.

But whether you work with us or not, use the framework. Score your deals. Be honest about where you are. Make a plan to improve. Take action this week.

Because the loudest voice in your head is always going to be your own. And if you're the one making up the story about why a deal is going to close, you're in trouble.

Let the framework keep you honest. Let the scores tell you the truth. Let the system guide your actions.

Sales is hard enough without lying to yourself about where you really are.

Now go score those five deals. I'll be waiting to hear how it goes.

Good luck. And good selling.

—Ken Lundin

Appendices

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APPENDIX A

O2C Scoring Cheat Sheet

Use this one-page reference to score every opportunity in your pipeline. For each deal, score yourself 0-3 in each category. Be honest—not hopeful.

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| Category | 0-3 Criteria | Watch Out For | Top 3 Questions |

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| Business Motivation | 0: No information | Using 'I think' or 'sort of' when describing urgency. If you're inferring pain instead of validating it, you have a 1 with Happy Ears. | 1. How does this connect to your 12-month goals? |

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| | 1: Tactical need identified | | 2. What's the cost of not solving this? |

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| | 2: Connected to strategic priority (unvalidated) | | 3. What happens if you’re still dealing with this in 6 months? |

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| | 3: Validated as urgent & important by DM | | |

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| **Ambassador** | 0: No Ambassador | Confusing friendliness with commitment. If they won’t introduce you to the Decision Maker, they’re not really your Ambassador. | 1. If we’re successful, how does that impact you personally? |

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| | 1: Identified, not committed | | 2. Who else needs to be involved? |

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| | 2: Committed, hasn’t taken you to DM | | 3. Are you comfortable introducing me to [Decision Maker]? |

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| | 3: Actively selling on your behalf | | |

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| **Decision Maker** | 0: Unknown | Selling to someone who says ‘I’ll need to run this by…' They sound important but can’t sign. Find the real Decision Maker. | 1. What are your top 3 priorities for the next 12 months? |

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| | 1: Identified, not validated | | 2. Do you have budget allocated for this? |

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| | 2: Priorities validated, budget unclear | | 3. What happens if this doesn’t get done by [date]? |

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| | 3: Budget & compelling event confirmed | | |

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| **Competitors** | 0: No information | Status quo is your biggest competitor. 40-60% of deals are lost to ‘no decision.' If you haven’t made the case for change, you haven’t really competed. | 1. Who else are you looking at? |

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| | 1: Competitors identified | | 2. What concerns do you have about their solution? |

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| | 2: Differentiated solution | | 3. If you had to choose today, what would drive that decision? |

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| | 3: Preferred solution validated by DM | | |

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| **Decision Process** | 0: No information on criteria | Assuming you know what matters without asking. In a 6-person DMU, you might have 6 different priority lists.

Validate with the Decision Maker. | 1. What are the top 3 factors driving this decision? |

| | | | |

| | 1: Criteria identified, not validated | | 2. Who needs to sign off on this? |

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| | 2: Validated criteria, not won | | 3. Based on what you've seen, do we meet your criteria? |

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| | 3: Won criteria, DM agreed to move forward | | |

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| **Paper Process** | 0: No information | Thinking the deal is done when they say yes. It's not done until the check clears. Legal, procurement, and security can kill 'done deals.' | 1. Walk me through what happens after we submit a proposal. |

| | | | |

| | 1: Confirmed process, not started | | 2. What's the typical timeline for contract review? |

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| | 2: In process, timeline defined | | 3. Who can intervene if things get delayed? |

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| | 3: DM will intervene, compelling event exists | | |

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APPENDIX B

Sample Questions by Category

Here are the specific questions that actually work. Not generic discovery questions—the prompts that get prospects to reveal what's really going on.

These aren't scripts to memorize. They're frameworks to adapt based on your industry, your solution, and your prospect's situation. The goal isn't to check boxes—it's to uncover truth.

Business Motivation Questions

Ask these when:

You're in discovery calls, qualification meetings, or anytime you need to connect a tactical problem to a strategic business priority.

1. "What's the specific issue you're trying to solve?"

What a good answer sounds like: They give you specifics—numbers, timeframes, impacts. "We're losing 15 hours a week to manual data entry" not "things could be better."

2. "If you solve this, what does that enable you to do next?"

What a good answer sounds like: They connect it to something bigger. "We can finally launch the new product line" or "We can reallocate those resources to revenue-generating activities."

3. “How does this connect to your goals for the next 12 months?”

What a good answer sounds like: They tie it directly to a strategic initiative. “This is critical to our Q2 expansion plan” not “it would be nice to have.”

4. “What’s the cost of not solving this—in dollars, time, or risk?”

What a good answer sounds like: They quantify it. “We’re leaving $2M in revenue on the table” or “We’re at risk of non-compliance which could cost us our biggest client.”

5. “What happens if you’re still dealing with this problem in 6 months?”

What a good answer sounds like: They express real consequences. “We’ll miss our growth targets” or “I’ll probably be looking for a new job.”

Ambassador Questions

Ask these when:

You’re trying to identify potential Ambassadors, confirm commitment, or understand their personal motivation.

1. “What made you want to explore solutions like ours?”

What a good answer sounds like: They reveal personal pain. “I’m tired of staying late to clean up these errors” or “I need this to hit my department’s goals.”

2. “If we’re successful here, how does that impact you personally?”

What a good answer sounds like: They articulate their personal win. “I’ll finally have bandwidth to work on strategic projects” or “This will get me closer to that promotion.”

3. “Who else needs to be involved in this decision?”

What a good answer sounds like: They identify the Decision Maker and other stakeholders. “My boss, the VP, will need to sign off” or “Legal and procurement will be involved.”

4. “What’s your biggest concern about moving forward?”

What a good answer sounds like: They tell you what could derail the deal. “Getting buy-in from the CFO” or “Making sure the implementation doesn’t disrupt operations.”

5. “Are you comfortable introducing me to [Decision Maker]?”

What a good answer sounds like: If they say yes and set it up, they’re committed. If they hesitate or deflect, you don’t have a real Ambassador yet.

Decision Maker Questions

Ask these when:

You’re in your first meeting with the Decision Maker to validate business priorities, budget, and compelling events.

1. “What are your top three business priorities for the next 12 months?”

What a good answer sounds like: They give you specific strategic goals. If solving their problem doesn’t map to one of these three, it’s not urgent.

2. “How does this initiative fit into those priorities?”

What a good answer sounds like: They connect your solution directly to priority #1 or #2. If it’s #3 or lower, you’re fighting for attention.

3. “Do you have budget allocated for this, or would you need to pull from somewhere else?”

What a good answer sounds like: “We have budget approved” is better than “we can probably find it.” The first is committed; the second is hopeful.

4. “What happens if this doesn’t get done by [date]?”

What a good answer sounds like: They describe real consequences. “We miss the product launch” or “We lose our competitive edge.” That’s your compelling event.

5. “Is there anything that would prevent you from moving forward if this meets your needs?”

What a good answer sounds like: They either say “no” (great), or they reveal hidden obstacles. “We’d need board approval” or “IT would need to sign off.” Now you know what to address.

Competitors Questions

Ask these when:

You need to understand the competitive landscape and differentiate your solution. Critical in mid-to-late stage deals.

1. “Who else are you looking at?”

What a good answer sounds like: They tell you. If they say “just you,” press gently: “What about staying with your current process?” Status quo is always a competitor.

2. “What do you like about what they’re offering?”

What a good answer sounds like: They give specifics. This tells you what matters to them and what you need to address.

3. “What concerns do you have about their solution?”

What a good answer sounds like: They reveal weaknesses. This is your opportunity to differentiate without badmouthing the competition.

4. “If you had to choose today, what would drive that decision?”

What a good answer sounds like: They tell you what matters most. Price? Speed? Support? This is your differentiation opportunity.

5. “What would make doing nothing seem like the better option?”

What a good answer sounds like: They reveal risk aversion. “If the implementation looks too disruptive” or “If the ROI timeline is too long.” Now you know what to overcome.

Decision Process Questions

Ask these when:

You need to understand decision criteria, process, and timeline. Essential after initial interest is established.

1. “What are the top three factors driving this decision?”

What a good answer sounds like: They give you specific criteria. “Speed of implementation, ease of use, and total cost of ownership.” Now you know what to emphasize.

2. “How will you evaluate whether each solution meets those criteria?”

What a good answer sounds like: They describe the evaluation process. If it’s vague, you need to help them define it—and make sure it favors your strengths.

3. “Who needs to sign off on this decision?”

What a good answer sounds like: They map out the Decision Making Unit. If they say “just me” but they’re not a VP or above, press further.

4. “What’s your ideal timeline for making a decision?”

What a good answer sounds like: They give you a specific date and explain why. “We need to decide by March 15 to be live for Q2” is better than “sometime soon.”

5. “Based on what you’ve seen, do you feel we meet your criteria?”

What a good answer sounds like: They say yes with conviction. If they hedge or say “mostly,” dig deeper on what’s missing.

Paper Process Questions

Ask these when:

You’re about to submit a proposal and need to understand what happens after they say yes.

1. “Walk me through what happens after we submit a proposal.”

What a good answer sounds like: They map out the entire process: “Legal reviews it, then procurement negotiates, then it goes to finance for approval, then the CFO signs.” If they say “we just sign it,” they’re either lying or don’t know.

2. “Who needs to review the contract? Legal? Procurement? Security?”

What a good answer sounds like: They identify all stakeholders in the paper process. Each one is a potential delay.

3. “What’s the typical timeline for contract review here?”

What a good answer sounds like: They give you a realistic timeline. “Legal usually takes 2-3 weeks” is useful. “It’s pretty fast” is useless.

4. “Have there been deals that got stuck in this process before? What happened?”

What a good answer sounds like: They warn you about potential landmines. “Legal always pushes back on indemnification clauses” tells you what to prepare for.

5. “Who can intervene if things get delayed?”

What a good answer sounds like: They identify someone with authority who cares about the deadline. “The CFO said if legal stalls, she’ll escalate.” That’s a Score 3.

How to Use These Questions

Don’t fire these off like you’re reading from a script. That’s how you sound like every other salesperson they’ve talked to.

Instead, weave them into natural conversation. Listen to their answers. Ask follow-up questions. Make them think. Make them articulate why this matters.

Because here’s the truth: it’s more important for the prospect to hear themselves say it than for us to tell them.

When they articulate the pain, the urgency, the strategic priority—when they say it out loud—that’s when it becomes real for them. That's when conviction replaces hope. That's when deals actually close.

APPENDIX C

The Needs Brief Template

The Needs Brief is your tool for working with your Ambassador to build a compelling business case. This isn't a document you fill out alone—it's a collaborative process that helps your Ambassador articulate the problem, quantify the impact, and connect it to strategic priorities.

How to Use This Template

Schedule a dedicated session with your Ambassador. Tell them: "I want to make sure I fully understand your situation so I can help you build the strongest case possible. Can we spend 30 minutes walking through this together?"

Work through each section systematically. Don't rush. The more specific they are, the stronger your case becomes. If they give vague answers, dig deeper. "What does that look like in numbers?" "Who specifically is affected?" "What happens if this doesn't change?"

After the session, clean up the document and send it back to them. Ask: "Does this accurately capture what we discussed? Anything missing or incorrect?" This confirmation step is critical—it ensures they own the narrative.

The Needs Brief

Company & Contact Information

Company Name: ____

Ambassador Name: ____

Ambassador Title: ____

Decision Maker Name: ____

Decision Maker Title: ____

Date: ____

Current Situation

What specific problem are you trying to solve?

____

____

____

How long has this been a problem?

____

What have you tried before? What worked? What didn't?

____

____

Business Impact

What is this problem costing you in dollars, time, or resources?

____

____

Who else is affected by this problem? How does it impact them?

____

____

What happens if you're still dealing with this problem in 6 months?

____

Strategic Connection

What are your company’s top 3 priorities for the next 12 months?

1.
2.
3.

How does solving this problem connect to those priorities?

If you solve this, what does that enable you to do next?

Desired Outcome

What would success look like 12 months after implementing a solution?

How would you measure success?

Personal Impact

How does this problem affect you personally in your role?

If we’re successful, how does that impact you personally?

Example: Completed Needs Brief

Here’s what a strong, completed Needs Brief looks like:

Company & Contact Information

Company Name: TechCorp Solutions

Ambassador Name: Sarah Chen

Ambassador Title: Director of Sales Operations

Decision Maker Name: Michael Rodriguez

Decision Maker Title: VP of Sales

Date: February 15, 2025

Current Situation

What specific problem are you trying to solve?

Our sales team is spending 18-20 hours per week on manual pipeline reporting and forecast updates. Reps are pulling data from three different systems, building custom spreadsheets, and reconciling inconsistencies. This leaves them with less than 30% of their time for actual selling activities.

How long has this been a problem?

18 months. It got worse when we acquired MidWest Solutions and inherited their legacy CRM system.

What have you tried before?

We hired a data analyst to build automated reports, but they're still pulling from multiple sources and reps don't trust the accuracy. We also tried to consolidate onto one CRM, but the migration stalled due to data quality issues.

Business Impact

What is this costing you?

$2.1M in lost productivity annually (35 reps × 18 hours/week × $67/hour loaded cost). More critically, we're missing forecast by 15-20% each quarter because we don't have real-time visibility into pipeline health.

Who else is affected?

Finance can't accurately plan headcount or investments. Marketing doesn't know which campaigns are driving qualified pipeline. The executive team is making decisions on data that's 2-3 weeks old.

What happens if this continues?

We'll miss our Q2 growth targets, which puts our Series B funding at risk. Our CFO has made it clear that investor confidence depends on forecast accuracy.

Strategic Connection

Top 3 company priorities:

1. Achieve 40% revenue growth in 2025 to support Series B raise
2. Improve forecast accuracy to 90%+ for board confidence
3. Increase sales productivity by 25%

How does solving this connect?

Directly addresses priorities #2 and #3. Real-time pipeline visibility gives us forecast accuracy. Eliminating manual reporting gives reps 15-18 hours per week back for selling, which directly drives priority #1.

What does this enable?

With accurate forecasting, we can confidently hire 10 more reps in Q3. With reps spending 50% of their time selling instead of 30%, we can hit growth targets without expanding headcount costs proportionally.

Desired Outcome

Success 12 months from now:

Reps spend less than 2 hours per week on pipeline management. Forecast accuracy is consistently above 90%. The VP has real-time visibility into deal health across the entire organization. Sales productivity (measured by deals closed per rep) increases by 30%.

How we'd measure it:

Weekly time-tracking surveys, forecast vs. actual variance reports, deals closed per rep per quarter, and pipeline velocity metrics.

Personal Impact

How this affects Sarah:

I spend 25-30 hours per week firefighting data issues and reconciling reports. I have no bandwidth for the strategic initiatives the VP is asking for. I'm exhausted and my team's morale is low.

If successful:

I can finally focus on sales process optimization and training programs. My promotion to Senior Director depends on moving beyond operational firefighting. This gives me the time and credibility to do that.

APPENDIX D

30-Day O2C Implementation Plan

Here's the deal: reading this book without applying it is just entertainment. This 30-day plan turns theory into results.

Follow this week by week. Don't skip ahead. Don't try to do everything at once. The sequence matters.

Week 1: Foundation & Assessment

Read:

Introduction, Chapter 1 (7 Reasons You Lose Deals), and Chapter 2 (Why Use a Sales Methodology)

Do:

Pull up your current pipeline. List your top 10 opportunities. For each one, write down what you think the score is for each of the six categories (0-3). Don't overthink it—just gut check.

Now look at those scores honestly. How many 0s and 1s do you see? That's your starting point.

Milestone:

You should be able to answer: "Why am I losing deals?" and "What percentage of my pipeline is actually qualified?"

Week 2: The People Categories

Read:

Chapter 3 (Ambassador), Chapter 4 (Decision Maker), and Chapter 5 (Business Motivation)

Do:

Pick your top 5 opportunities. For each one, map out:

- Who is (or could be) your Ambassador?
- Who is the actual Decision Maker?
- What's the business motivation (tactical problem → strategic priority → compelling event)?

For any opportunity where you scored below a 2 in these categories, schedule a call this week to ask the validation questions from Appendix B.

Milestone:

You should have clear answers on who you're selling to and why it matters to them. If you can't articulate the compelling event in one sentence, you don't have one yet.

Week 3: The Process Categories

Read:

Chapter 6 (Competitors), Chapter 7 (Decision Process), and Chapter 8 (Paper Process)

Do:

For your top 5 opportunities, answer:

- Who/what are you competing against (including status quo)?
- What are the top 3 decision criteria, and have you validated them with the Decision Maker?
- What happens after they say yes? (Map the paper process.)

If you’re missing this information, get on calls this week and ask. Use the questions in Appendix B as your guide.

Milestone:

You should know exactly what you’re up against, what criteria you need to win, and how long it will actually take to close (not how long you hope it takes).

Week 4: Action & Iteration

Read:

Chapter 9 (The Real Work Starts Now) and all Appendices

Do:

Re-score your top 10 opportunities across all six categories. Compare these scores to your Week 1 assessment. What changed?

For every opportunity with a score of 0 or 1 in any category, create an action plan:

- What specific question do I need to ask?
- Who do I need to ask it to?
- When will I do it? (Schedule the call now.)

For any opportunity that still has multiple 0s or 1s after three weeks of work, seriously consider disqualifying it. That time is better spent on deals you can actually win.

Milestone:

Your pipeline should look dramatically different than it did in Week 1. You should have disqualified at least 2-3 deals that were never real. Your remaining opportunities should have clear paths forward with higher average scores.

Beyond Day 30: Make It a Habit

After 30 days, O2C isn’t a project anymore—it’s how you sell.

Here’s what happens next:

- **Weekly pipeline reviews:** Score every new opportunity within 48 hours of first contact. Update scores weekly.
- **Monthly retrospectives:** For every deal you win or lose, review your O2C scores. Were they accurate? What did you miss? What could you have done differently?
- **Quarterly pattern analysis:** Look at your closed-won deals. What were the common score patterns? Now look at closed-lost. Where did they consistently score low? This tells you what to prioritize.

What Success Looks Like

After 90 days of consistent O2C use, you should see:

- Higher average scores across your pipeline (fewer 0s and 1s)
- Shorter sales cycles (because you’re disqualifying faster and focusing on real opportunities)
- Better forecast accuracy (because you know which deals are real)
- Higher win rates (because you’re working better-qualified opportunities)
- Less stress (because you’re not surprised when deals slip or die)

This is what happens when you replace hope with validation. When you replace stories with facts. When you use a system instead of trusting your gut.

Now get to work.

Quick Start Guide

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QUICK START: GET VALUE IN 30 MINUTES

Don’t have time to read the whole book right now? I get it. You’re busy. Deals are moving. Quota’s breathing down your neck.

Here’s the deal—you can identify what’s killing your biggest deals in less than 30 minutes. Then fix it this week.

Most salespeople spend three months chasing a deal before they figure out it’s dead. You’re about to figure it out in three minutes. Per deal.

Step 1: Read the Introduction (5 minutes)

Start with the Introduction. It’ll tell you why 91% of sales organizations missed quota last year—and why six of the eight reasons are completely in your control.

You’ll understand the O2C framework—the scoring system that’s helped companies go from near-bankruptcy to acquisition, and individual reps go from PIPs to $600K+ years.

Step 2: Download the Cheat Sheet (2 minutes)

Go to **revheat.com/book** and download the O2C scoring cheat sheet.

It’s one page. Six categories. 0-3 scoring for each. You’ll reference it constantly.

Step 3: Score Your Top 3 Opportunities (15 minutes)

Pull up your three biggest active deals. The ones you’re counting on to make quota. The ones you’d bet money on.

Score each one across all six categories:

Ambassador (0-3): Do you have someone inside who’s actively selling for you?

Decision Maker (0-3): Are you talking to the person who can actually sign the contract?

Business Motivation (0-3): Is there a compelling event forcing them to act now?

Competitors (0-3): Do you know who you’re really up against?

Decision Process (0-3): Do you know every step between now and close?

Paper Process (0-3): Have you validated their contract and procurement requirements?

Be honest. Brutally honest. A 1 is better than lying to yourself with a 3.

Step 4: Find Your Weakest Category (3 minutes)

Look at your scores. Where are you getting zeros and ones?

That’s what’s killing your deals.

Maybe you scored a 0 on Decision Maker because you’ve been talking to your “champion” for three months but never met the actual buyer. Or maybe you scored a 1 on Business Motivation because they said “it’d be nice to have” but there’s no forcing function to close this quarter.

Whatever your weakest category is, that's your homework.

Step 5: Read That Chapter and Fix It (5 minutes reading + action)

Turn to the chapter for your weakest category. Read it. You'll get:

Specific questions to ask (not "best practices"—actual word-for-word scripts).

What good answers sound like versus what bad answers sound like.

Recovery moves when you've screwed it up or need to get back on track.

Then get on the phone. Send the email. Book the meeting. Fix the gap this week.

That's It. You Just Identified What's Killing Your Deals.

Most reps will spend another month hoping the deal closes. You just spent 30 minutes diagnosing the problem.

Now you know exactly what to fix.

Then, when you have time, read the full book chapter by chapter. Apply each category systematically to every deal in your pipeline. That's when you'll stop losing deals to "no decision" and start closing the ones you're supposed to close.

But for right now? You've got work to do.

About the Author

Ken Lundin is a recognized authority in B2B sales strategy and organizational performance. With decades of experience in complex enterprise sales, he has worked with companies of every size—from startups fighting for survival to three companies that became unicorns.

Ken personally led a business from $2 million to $78 million in five years. He has trained more than a thousand salespeople and consulted with over 150 CEOs on building winning sales cultures. His Opportunity to Close (O2C) framework has been battle-tested across hundreds of organizations and has generated billions in qualified pipeline.

He is a sought-after advisor, speaker, and coach for sales leaders and individual contributors who refuse to accept “we missed quota” as normal.

Connect with Ken at www.kenlundin.com

About The Book

The world of sales has never been more challenging than it is today. You and your team must navigate changing buyer expectations, their internal politics, competing interests, competitive pressures, reluctance to change and many other headwinds.

Each year, less than 50% of salespeople reach their quota, and this trend has been even more pronounced in recent years. Does it have to be this way? Is there a better way?

What if there was a way you and your team could increase the number of new deals you close by 300%, without any new leads?

A way to win more deals, unlock bigger budgets and create more urgency?

Sound interesting?

I wrote this book for those who no longer want to "wing it" or get lucky growing their sales. For those who know that the right process can unlock unimaginable growth like never before. For those who want to solve the big problems for their clients not just the small tactical ones.

Whether you are the Founder of a fast-growing start-up, the Head of Sales for a billion-dollar company, or a seller on the street this book is for you.

About The Author

Ken Lundin has helped to create $4 billion in market value for his clients in just the last 7 years.

He has been called the "Sales Ninja" due to a remarkable ability to consistently elevate win rates by over 300% for B2B sales teams, he is truly a force to be reckoned with in the world of sales.

He is the visionary behind RevHeat, an esteemed international sales consulting and training company. As the Founder, he has developed a groundbreaking approach for selling to mid-size and large companies, known as "The Opportunity to Close Roadmap." This innovative, client-focused methodology offers a prescriptive and objective path to achieving greater sales success.